

IDAHO EMPLOYMENT

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State Overview

IDAHO'S UNEMPLOYMENT RATE DECREASES TO 5.6 PERCENT

The seasonally adjusted unemployment rate for December 2002 was 5.6 percent, down two-tenths of a percentage point from November. Idaho's December rate was one-tenth of a percentage point above the 5.5 percent rate experienced one year ago, and four-tenths of a percentage point below the national unemployment rate of 6.0 percent, which was unchanged from November. During 2002, Idaho's unemployment rate ranged from a low of 5.0 percent in May to 5.8 percent in November. December was the third month in 2002 that the U.S. unemployment rate has been 6.0 percent. Prior to 2002 the national unemployment rate had not been that high since August 1994.

Idaho's seasonally adjusted *Civilian Labor Force* increased by 1,800 persons from November to 688,000 persons in December. The number of employed Idahoans increased by 3,200 between November and December, while the number of unemployed individuals decreased by 1,000. During the same time, the number of individuals employed nationally decreased by 300,000.

The decrease in the number of unemployed individuals indicates that seasonal hiring during December was normal, particularly in the retail and temporary employment agency sectors. However, some industries did experience job losses during the month, such as lumber and manufactured housing. The lack of early snow resulted in less activity at the state's winter resorts, thus fewer employment opportunities were available.

Although Idaho's December unemployment rate decreased from November, the impact of the sluggish economy during 2002 is reflected in the year-over-year changes in the labor force. In December 2002 there were 6,000 fewer individuals employed than in December 2001. During that same time period, there was an increase of 600 unemployed individuals. The number of individuals employed plus the number of individuals unemployed makes up the *Civilian Labor Force*, and from last December, the *Civilian Labor Force* decreased by 5,400 persons. Because the increase in the number unemployed doesn't account for all of the decrease in employment, it indicates that many individuals have become discouraged, and have left the labor force and are no longer counted.

DATA CONVERTS TO NAICS

This issue of *Idaho Employment* marks the last time industry employment will be reported on industry definitions contained in the **Standard Industrial Classification (SIC)** system. The nation's employment statistics programs has begun reporting data according to the **North American Industry Classification System (NAICS)**. The next issue of *Idaho Employment* will be published in April, reflecting the change to the NAICS system. It will include January data. Many of the industry titles will appear to be the same, but new ones were added, some titles were regrouped into new major business divisions, and the phrasing of some of the industry titles was simplified. Because of substantial changes made to the industry designation criteria, there is a series break between SIC-based data and NAICS-based data. The Idaho Department of Labor has made efforts to backcast some of the most demanded SIC-based data series into a NAICS-based series but caution is still urged in comparing pre-2003 data to the data that now will be published using NAICS criteria. The Department's Internet Labor Market Information menu page contains links to NAICS related sites (<http://www.jobservice.ws/>). The U.S. Bureau of Labor Statistics site (<http://www.bls.gov/sae/saenaics.htm>) can also provide additional sources of information concerning the SIC to NAICS conversion.

The annual average unemployment rate in 2002 is forecast at 5.4 percent, up four-tenths of a percentage point from 2001's annual average rate. This is the highest annual unemployment rate in Idaho since 1995. Idaho's annual average *Civilian Labor Force* increased from 2001 by 7,100 persons. The increase resulted from an increase in both the number of jobless workers and the number of individuals employed, 3,500 and 3,600, respectively. Although the numbers are similar, the number of jobless workers increased 10.4 percent compared to a 0.6 percent increase in the number of individuals employed. The nation's preliminary 2002 average unemployment rate is 5.8 percent compared to 4.8 percent in 2001.

The Panhandle Labor Market Area (LMA) had the highest December unemployment rate—8.4 percent—among all LMAs while the Bonneville LMA had the lowest—3.7 percent. The December rates for LMAs were lower than or equal to their November rates. From one year ago, only the Boise Metropolitan Statistical Area had a higher rate in December over November.

Six counties reported double-digit unemployment rates in December: Adams—17.7 percent, Clearwater—13.5 percent, Washington—13.3 percent, Payette—12.7 percent, Boundary—11.6 percent, and Shoshone—10.5 percent. Adams County is forecast to have the highest county annual unemployment rate for 2002 at 12.9 percent. This is followed by Clearwater County at 12.8 percent.

Unemployment rates below 3.0 percent in December 2001 occurred in only one county, Madison, at 2.0 percent. Madison County is also the only county to have an annual unemployment rate below 3.0 percent, at 1.8 percent.

The modest gain in employment from 2001 to 2002 indicates that in spite of job losses in some key industries, there was indeed some employment expansion. As recently as 1998, the state's average annual total employment declined from the previous year by approximately 2,800 employed people so the state has not had an unbroken string of employment growth throughout the 1990s to 2002, but there was impressive growth. Since 1990 total employment has increased by 188,500 workers for an overall 40.7 percent increase.

Industry Employment Developments

Total *Nonfarm Payroll Jobs* in December decreased by 3,200 jobs from November. This was the second month in a row that jobs were less than the previous month. The *Goods-Producing Industries* lost 2,400 jobs and the *Service-Producing Industries* accounted for the remaining 600 jobs of the loss total.

The job losses in *Goods-Producing Industries* were concentrated in three industries: *Construction*, down 1,500 jobs; *Lumber & Wood Products*, down 300 jobs; and *Food Processing*, down 400 jobs. While each of these industries usually has a winter downturn, December's job losses are consistent with continual job losses seen throughout the year.

The *Service-Producing Industries* job losses occurred primarily in *Retail Trade* and *State and Local Government*. The holiday shopping season normally drives up employment in merchandise retailers. This year there were minimal job gains in this activity. Many stores had staffed up in November, and December's soft sales levels and deep price discounting, at least nationally, caused reluctance among retail establishments to hire additional personnel in December. Reports showed that there was a national trend to cut out large, lavish business-sponsored holiday parties in 2002. There were a few reports that some Idaho firms were following suit and this might have contributed to the 400-job decrease in *Eating & Drinking Places*.

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Job increases in *Hotels & Other Lodging Places* and *Amusement and Recreation Services* hint at some recovery in Idaho's tourism industry, but the year-over-year job losses in *Hotels & Other Lodging Places* is another hint that the adverse effects of the September 11 tragedy are still being felt in the travel and business meeting categories.

Overall, belt tightening best explains the monthly job losses in *State and Local Government*. Current year spending holdbacks and bleak budget forecasts are resulting in job losses through attrition, fewer temporary employees, and deferrals in program and facilities expansions.

Preliminary data indicates Idaho's average annual nonfarm employment dropped in 2002 by 4,258 from 2001. This is a 0.7 percent job loss. *Construction* and *Manufacturing* (electronics) each lost 2,000 jobs during the year, and these two industries have been largely responsible for Idaho's significant labor market gains during the previous few years. Almost all other industries incurred job losses, but not of the magnitude of these two. *Service-Producing Industries* added 2,800 jobs on an annual average basis. *Health Services* and *Government* each added 1,900 jobs, but these gains were partially offset by losses in the tourism-related industries as the effects of the September 11 tragedy lingered.

EMPLOYMENT OUTLOOK

What does Idaho's 2002 labor market experience bode for the next 18 months? Every year the Idaho Legislature asks the Idaho Department of Labor to provide an analysis of what the Department expects the economy, and the employment component in particular, to do during the next 18 months. The following is a summary of that analysis.

There were several long-term and short-term conditions that significantly influenced Idaho's economy and employment situation in 2002. Some were national in origin while others were more local, but both combined, affected Idaho.

- The national recession sprang up rather rapidly in the late winter of 2002, caused by the decline in business investment. This decline has been attributed to a host of factors, such as the dot.com bubble burst, a drop in corporate profits and earnings, hesitancy in the capital markets to offer venture capital or riskier loans, and the loss of stockholder equity because of large stock market drops. The recession hit Idaho's electronics industries especially hard.
- Consumer confidence remained remarkably strong but not robust. Lingering effects of the September 11 tragedy, loss of value in retirement funds and market values, high consumer credit balances, and uncertainties about a war with Iraq were drags on consumer confidence. This led to such activities as deep price-cutting and buying incentives, but did not add

State Table 1: December 2002 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	35,137	1,420	4.0	33,717
Nez Perce County	23,150	874	3.8	22,276
Asotin County, WA	11,987	546	4.6	11,441
Boise City MSA	248,236	12,742	5.1	235,494
Ada County	179,237	8,237	4.6	171,001
Canyon County	68,999	4,505	6.5	64,493
Pocatello City MSA*	40,269	2,118	5.3	38,151
Bonneville LMA	82,951	3,072	3.7	79,879
Bingham County	22,577	985	4.4	21,592
Bonneville County	48,103	1,640	3.4	46,463
Butte County	1,643	61	3.7	1,582
Jefferson County	10,628	386	3.6	10,243
Cassia-Minidoka LMA	19,837	1,443	7.3	18,394
Cassia County	9,879	694	7.0	9,185
Minidoka County	9,958	749	7.5	9,209
Idaho-Lewis LMA	7,952	651	8.2	7,300
Idaho County	6,410	599	9.3	5,811
Lewis County	1,541	52	3.4	1,489
Panhandle LMA	93,352	7,873	8.4	85,479
Benewah County	4,516	445	9.9	4,071
Bonner County	18,067	1,436	7.9	16,631
Boundary County	4,835	563	11.6	4,272
Kootenai County	59,168	4,718	8.0	54,450
Shoshone County	6,766	710	10.5	6,056
Magic Valley LMA	50,772	1,991	3.9	48,781
Gooding County	7,074	252	3.6	6,822
Jerome County	9,495	351	3.7	9,144
Twin Falls County	34,203	1,388	4.1	32,815
Adams County	1,630	287	17.6	1,343
Bear Lake County	2,944	207	7.0	2,737
Blaine County	12,618	515	4.1	12,103
Boise County	2,674	207	7.8	2,467
Camas County	498	29	5.8	470
Caribou County	3,341	269	8.0	3,072
Clark County	601	27	4.5	575
Clearwater County	3,672	496	13.5	3,176
Custer County	1,954	157	8.0	1,797
Elmore County	10,095	737	7.3	9,358
Franklin County	5,348	239	4.5	5,109
Fremont County	5,228	312	6.0	4,916
Gem County	5,747	503	8.7	5,244
Latah County	14,617	511	3.5	14,107
Lemhi County	3,685	279	7.6	3,406
Lincoln County	2,189	123	5.6	2,067
Madison County	12,634	250	2.0	12,385
Oneida County	1,742	117	6.7	1,626
Owyhee County	4,008	126	3.1	3,882
Payette County	10,317	1,062	10.3	9,255
Power County	3,229	284	8.8	2,945
Teton County	3,960	134	3.4	3,827
Valley County	3,952	369	9.3	3,582
Washington County	4,724	549	11.6	4,174
State of Idaho	687,926	38,550	5.6	649,376
Idaho Cities				
Boise	113,607	5,362	4.7	108,245
Coeur d'Alene	20,927	1,342	6.4	19,585
Idaho Falls	29,752	1,101	3.7	28,651
Lewiston	19,683	659	3.3	19,024
Nampa	21,179	1,562	7.4	19,617
Pocatello	28,913	1,557	5.4	27,356
Twin Falls	17,967	800	4.5	17,167

* Pocatello MSA includes all of Bannock County.

significantly to employment as merchants had to hold down costs. The slight decline in Idaho's *Retail Trade* industries' average annual employment was attributed in part to consumer confidence.

- International trade policies and the exchange rates somewhat favored imports over exports, and this trade deficit did not benefit a nation already in a recession. Several Idaho industries were particularly affected. Idaho electronic chip manufacturers alleged unfair foreign government subsidies to their foreign competitors and nations concerned about genetically modified seed and food stuffs created barriers to the export of Idaho commodities. Idaho's timber industries have complained for several years about how Canadian government policies have promoted the import of Canadian lumber at the expense of domestic products.
- Idaho's explosive population growth of the late 1990s has slowed down in the early 2000s, although Idaho remained one of the fastest growing states (ninth) between 2001 and 2002. There has been a slowdown in the net migration of people to Idaho. This was partially responsible for a loss in *Construction* employment that also had to contend with a slowdown in commercial and publicly financed building projects. Slower population growth also contributed to the slowdown in the growth of the state's *Civilian Labor Force*. Between 2000 and 2001, the labor force grew by 3.7 percent; between 2001 and 2002, the growth rate was 1.6 percent.
- Idaho experienced a drought in the summer of 2002. Virtually all available water was used for crops, hydroelectric power, fish management, and recreation. Although these conditions were unfavorable, the state squeaked by without undue employment and output losses. Yet the drought of 2002 brought increased concern about water availability in 2003, because there is very little carryover stored water, and availability will be almost entirely dependent upon winter snow and rainfall, which is below normal in most parts of the state.

Will these conditions persist? Will new ones emerge? We are assuming the following conditions will be present in the next 18 months (January 1, 2003, to June 30, 2004).

- Recovery from the national recession should be well in place by late summer of 2003. However, large job gains and lower employment rates will lag as the already-hired labor supply will fill jobs at first. Business investments will grow, although businesses will first try to build inventories and improve profits and earnings before large capital investments are made. Idaho's electronics industries will benefit from these more favorable business conditions as well as from

new products coming on line, but in general it will be a jobless recovery for a while.

- Consumer confidence will improve as long there is low inflation, and economic conditions and the various war scenarios are seen to be improving. However, wage gains by workers will be modest at best. Low inflation means less pressure to raise wages to keep pace. Employers and workers will have to absorb skyrocketing health insurance costs and this will come at the expense of wage increases. Corporate accountability might curtail very high wages for select staff. State and local governments are struggling with significant budget deficits.
- Oil and gas prices are a big unknown. A war in Iraq and continued strife in the Middle East and the oil countries of South America will raise prices in the short-term and might dampen economic recovery.
- Another low water season will occur and the probability of agricultural droughts being declared is high.
- Idaho's population growth will be in the 1.0 to 1.5 percent range, and the urban areas will grow more than the rural areas (excluding those very low population counties in which 10 or so more people can significantly change population percentage rates).

Given these assumed conditions, we suggest the following developments are likely to happen during the next 18 months.

The *Civilian Labor Force* will grow slowly throughout this period. For the remainder of this calendar year, the growth will be under 0.75 percent, then accelerate to slightly above 1.0 percent for the first six months of 2004. This growth will come from similar increases in *Total Employment* accompanied by the usual ups and downs in the number of people unemployed.

The monthly unemployment rates are predicted to be within the 5.5 to 6.0 percent range, but average 5.5 percent for the 18 month period.

Unemployment rates will not deviate substantially from the pattern of the last few years. Four to five counties will experience double-digit unemployment rates, and these are the counties that rely heavily on the timber or mining industries. Counties with below average unemployment rates generally will have a strong agricultural base. The unemployment rates in urban areas will be close to the state's average, although Kootenai County will still be above the average. The university counties of Latah and Madison will have the lowest rates because university-related employment drives those counties' employment.

Continued on page 29

State Table 2: Confirm Payroll Jobs

BY PLACE OF WORK	Dec 2002*	Nov 2002	Dec 2001	% Change From	
				Last Month	Last Year
Nonfarm Payroll Jobs**	565,300	568,500	571,700	-0.6	-1.1
GOODS-PRODUCING INDUSTRIES	103,700	106,100	110,700	-2.3	-6.3
Mining	1,600	1,700	1,700	-5.9	-5.9
Metal Mining	500	500	500	0.0	0.0
Construction	32,200	33,700	36,200	-4.5	-11.0
Manufacturing	69,900	70,700	72,800	-1.1	-4.0
Durable Goods	42,000	42,400	44,200	-0.9	-5.0
Lumber & Wood Products	10,400	10,700	11,300	-2.8	-8.0
Logging	1,800	1,900	2,300	-5.3	-21.7
Sawmills & Planing Mills	3,900	4,000	4,100	-2.5	-4.9
Wood Buildings & Mobile Homes	1,100	1,100	1,100	0.0	0.0
Other Lumber & Wood Products	3,600	3,700	3,800	-2.7	-5.3
Stone, Clay, Glass & Concrete Products	1,500	1,600	1,400	-6.3	7.1
Fabricated Metal Products, exc. Machinery & Transportation Equip.	2,600	2,700	2,900	-3.7	-10.3
Industrial & Commercial Machinery & Computer Equipment	8,700	8,800	9,400	-1.1	-7.4
Electronic & Other Electrical Equip. & Components, Exc., Computer	13,100	13,200	13,400	-0.8	-2.2
Transportation Equipment	2,200	2,000	2,100	10.0	4.8
Other Durable Goods	3,500	3,400	3,700	2.9	-5.4
Nondurable Goods	27,900	28,300	28,600	-1.4	-2.4
Food Processing	17,000	17,400	17,100	-2.3	-0.6
Canned, Frozen, & Preserved Fruits, Vegetables & Food Specialties	9,300	9,600	9,200	-3.1	1.1
Paper Products	2,000	2,000	2,200	0.0	-9.1
Printing, Publishing & Allied Products	5,000	5,000	5,100	0.0	-2.0
Chemicals & Allied Products	2,000	2,000	2,300	0.0	-13.0
Other Nondurable Goods	1,900	1,900	1,900	0.0	0.0
SERVICE-PRODUCING INDUSTRIES	461,600	462,400	461,000	-0.2	0.1
Transportation, Communications, & Utilities	27,500	27,500	27,800	0.0	-1.1
Transportation	16,900	16,900	17,800	0.0	-5.1
Railroad	1,200	1,200	1,300	0.0	-7.7
Motor Freight Transportation & Warehousing	9,900	10,000	10,400	-1.0	-4.8
Communications	6,500	6,500	6,000	0.0	8.3
Electric, Gas, & Sanitary Services	4,100	4,100	4,000	0.0	2.5
Trade	141,100	141,900	142,300	-0.6	-0.8
Wholesale Trade	31,200	31,300	31,900	-0.3	-2.2
Durable Goods	14,500	14,600	14,800	-0.7	-2.0
Nondurable Goods	16,700	16,700	17,100	0.0	-2.3
Retail Trade	109,900	110,600	110,400	-0.6	-0.5
Building Materials, Hardware, Garden Supply & Manuf. Home Dealers	6,600	6,700	6,400	-1.5	3.1
General Merchandise Stores	15,300	15,300	14,600	0.0	4.8
Food Stores	18,300	18,400	18,800	-0.5	-2.7
Automotive Dealers & Gasoline Service Stations	12,200	12,500	12,400	-2.4	-1.6
Eating & Drinking Places	37,500	37,900	37,500	-1.1	0.0
Finance, Insurance & Real Estate	24,800	24,800	24,800	0.0	0.0
Banking	7,500	7,400	7,400	1.4	1.4
Services	153,500	153,100	152,600	0.3	0.6
Hotels & Other Lodging Places	6,800	6,700	7,700	1.5	-11.7
Personal Services	4,700	4,700	4,400	0.0	6.8
Business Services	29,300	29,500	31,300	-0.7	-6.4
Amusement and Recreation Services	7,800	6,900	6,700	13.0	16.4
Health Services	40,800	40,700	39,200	0.2	4.1
Hospitals	13,900	13,900	13,500	0.0	3.0
Engineering, Accounting, Research, Management, & Related Services	19,600	19,800	19,400	-1.0	1.0
Government	114,700	115,100	113,500	-0.3	1.1
Federal Government	13,000	12,900	12,500	0.8	4.0
State & Local Government	101,700	102,200	101,000	-0.5	0.7
State Government	29,000	29,300	29,800	-1.0	-2.7
Education	14,800	14,900	14,800	-0.7	0.0
Administration	14,200	14,400	15,000	-1.4	-5.3
Local Government	72,700	72,900	71,200	-0.3	2.1
Education	41,200	41,400	40,800	-0.5	1.0
Administration	31,500	31,500	30,400	0.0	3.6

* Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

DATA PREPARED IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS

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State Table 3: Economic Indicators

State Table C: Economic Indicators

				% Change From					
	Dec 2002	Nov 2002	Dec 2001	Last Month	Last Year				
IDAHO LABOR FORCE ⁽¹⁾									
Seasonally Adjusted									
Civilian Labor Force	687,900	685,400	693,300	0.4	-0.8				
Unemployment	38,500	39,500	37,900	-2.5	1.6				
Percent of Labor Force Unemployed	5.6	5.8	5.5						
Total Employment	649,400	645,900	655,400	0.5	-0.9				
Unadjusted									
Civilian Labor Force	685,900	686,200	690,300	0.0	-0.6				
Unemployment	41,500	37,500	40,600	10.7	2.2				
Percent of Labor Force Unemployed	6.1	5.5	5.9						
Total Employment	644,400	648,700	649,700	-0.7	-0.8				
U. S. UNEMPLOYMENT RATE ⁽²⁾	6.0	6.0	5.8						
U.S. CONSUMER PRICE INDEX ⁽²⁾									
Urban Wage Earners & Clerical Workers (CPI-W)	177	177.4	172.9	-0.2	2.4				
All Urban Consumer (CPI-U)	180.9	181.3	176.7	-0.2	2.4				
AGRICULTURE									
Agriculture Employment	28,590	31,830	28,360	-10.2	0.8				
Operators	9,010	9,000	9,010	0.1	0.0				
Unpaid Family	410	490	410	-16.3	0.0				
Hired Workers	19,170	22,340	18,940	-14.2	1.2				
UNEMPLOYMENT INSURANCE									
Claims Activities									
Initial Claims ⁽³⁾	22,227	16,908	18,819	31.5	18.1				
Weeks Claimed ⁽⁴⁾	125,080	73,562	114,194	70.0	9.5				
Benefit Payment Activities⁽⁵⁾									
Weeks Compensated	99,725	58,016	72,978	71.9	36.7				
Total Benefit \$ Paid	\$22,067,557	\$12,548,840	\$16,141,326	75.9	36.7				
Average Weekly Benefit Amount	\$221.28	\$216.30	\$221.18	2.3	0.0				
Covered Employers	40,633	40,596	40,459	0.1	0.4				
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$217,384,029	\$211,457,798	\$149,629,576	2.8	45.3				
(1) Preliminary Estimate									
(2) Source: U.S. Bureau of Labor Statistics									
(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims									
(4) Includes all entitlements/programs, Intrastate and Interstate Agent									
(5) Includes all entitlements/programs, Total Liable Activities									
HOURS AND EARNINGS									
	Average Weekly Earnings*			Average Weekly Hours			Average Hourly Earnings		
	Dec 2002	Nov 2002	Dec 2001	Dec 2002	Nov 2002	Dec 2001	Dec 2002	Nov 2002	Dec 2001
Mining	\$672.32	\$671.41	\$570.78	39.9	38.9	37.7	\$16.85	\$17.26	\$15.14
Construction	\$575.93	\$608.88	\$542.30	33.7	36.2	35.1	\$17.09	\$16.82	\$15.45
Total Manufacturing	\$636.80	\$596.80	\$567.36	40.0	37.3	37.9	\$15.92	\$16.00	\$14.97
Lumber & Wood Products	\$538.56	\$552.37	\$535.72	36.0	36.8	37.7	\$14.96	\$15.01	\$14.21
Food & Kindred Products	\$505.51	\$418.68	\$461.78	41.3	36.0	39.3	\$12.24	\$11.63	\$11.75
Communications	\$901.07	\$891.75	\$727.40	43.3	41.0	41.4	\$20.81	\$21.75	\$17.57
Electric, Gas, & Sanitary Services	\$727.31	\$741.34	\$872.71	35.6	35.9	39.4	\$20.43	\$20.65	\$22.15
Trade	\$326.11	\$314.31	\$322.07	29.3	28.6	30.1	\$11.13	\$10.99	\$10.70
Wholesale Trade	\$509.68	\$483.93	\$517.24	33.4	32.5	35.5	\$15.26	\$14.89	\$14.57
Retail Trade	\$280.17	\$271.31	\$268.92	28.3	27.6	28.7	\$9.90	\$9.83	\$9.37
DATA PREPARED IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS									
* These average earnings are computed on a gross basis and reflect changes in premium pay for overtime and late shift work as well as changes in basic hourly and incentive wage									



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

Although the economic recovery has been slow and tenuous, its effect is visible in the Panhandle's falling unemployment rate. Between December 2001 and December 2002, the Panhandle's seasonally adjusted unemployment rate fell from 9.0 percent to 8.4 percent, and *Nonfarm Payroll Jobs* increased 2.0 percent, from 67,680 to 69,020.

At first glance, the November-to-December statistics may not paint a picture of recovery. However, much of the unemployment increase between November and December resulted from the temporary shutdowns of the two Louisiana-Pacific mills in Boundary County. Both mills were back in production by early January, so the unemployment was short-lived. The payroll job losses between November and December were the normal job losses experienced between those two months each year, so they did not indicate additional stresses on the Panhandle economy.

Despite continued weakness most industrial sectors gained strength in the last half of 2002. After suffering large losses in recent years, *Mining* employment stabilized during 2002. Low mortgage rates fueling residential construction and warm, dry weather this fall and winter kept *Construction* active at higher rates than normal. Employment reductions in *Lumber & Wood Products* between December 2001 and December 2002 reflect the temporary mill shutdowns; otherwise, employment would have been slightly higher than the year before. Jobs in *All Other Manufacturing* also steadied in 2002, in large part because job losses early in 2002 were offset by job gains made by three Sandpoint manufacturers—Litehouse Dressing, Unicep Packaging, and Packer Aircraft. *Retail Trade* held its own during 2002. *Services* added jobs, mostly at call centers and health care providers. Despite tighter budgets for state and local government, *Government Administration* grew because community hospitals added jobs. North Idaho College and the public school districts also added jobs as their enrollments grew.

Like the rest of the United States, the Panhandle is not clearly out of the woods yet. There remains many unemployed

Panhandle Table 1: Labor Force & Employment

	Dec 2002*	Nov 2002	Dec 2001	% Change From Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	93,350	92,850	91,480	0.5	2.0
Unemployed	7,870	7,490	8,270	5.1	-4.8
% of Labor Force Unemployed	8.4%	8.1%	9.0%		
Total Employment	85,480	85,360	83,210	0.1	2.7
Unadjusted					
Civilian Labor Force	93,910	93,250	88,440	0.7	6.2
Unemployed	8,830	7,030	9,200	25.6	-4.0
% of Labor Force Unemployed	9.4%	7.5%	10.4%		
Total Employment	85,080	86,220	79,240	-1.3	7.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	69,020	69,880	67,680	-1.2	2.0
Goods-Producing Industries	13,010	13,610	13,310	-4.4	-2.3
Mining	530	540	560	-1.9	-5.4
Construction	4,090	4,440	4,190	-7.9	-2.4
Manufacturing	8,390	8,630	8,560	-2.8	-2.0
Lumber & Wood Products	3,990	4,200	4,110	-5.0	-2.9
All Other Manufacturing	4,400	4,430	4,450	-0.7	-1.1
Service-Producing Industries	56,010	56,270	54,370	-0.5	3.0
Transportation	1,470	1,470	1,450	0.0	1.4
Communication & Utilities	1,010	1,030	1,040	-1.9	-2.9
Wholesale Trade	2,140	2,130	2,100	0.5	1.9
Retail Trade	15,380	15,250	15,110	0.9	1.8
Finance, Insurance & Real Estate	2,680	2,700	2,730	-0.7	-1.8
Service & Miscellaneous	18,750	18,800	17,520	-0.3	7.0
Government Administration	8,830	9,120	8,780	-3.2	0.6
Government Education	5,750	5,770	5,640	-0.3	2.0

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

workers, and many of them have been unemployed for exceptionally long periods. The outlook for wood products is grim. With prices near a ten-year low, mills and logging companies may be forced to lay off workers in 2003. Other manufacturers still face tough markets; most don't expect significant turnarounds until the third quarter. Low snow levels this winter hurt tourist operations, especially in areas that rely on snowmobilers. Summer tourism could be hurt if gasoline prices increase.

AREA DEVELOPMENTS

Benewah County

- The City of St. Maries broke ground on a \$1.9 million water treatment plant on January 15. That was the first of the area's seven major construction projects planned for 2003. Another project will be the construction of a water transmission line through Riverdale to the treatment plant. Bids opened on January 30 for the \$2.2 million downtown revitalization project detailed in the May 2002 *Idaho Employment*. The \$1.2 million reconstruction of the St. Maries floodwall, described in the December 2002 *Idaho Employment*, will start this spring. Other St. Maries construction projects starting this year include a \$1.2 million improvement of the St. Maries Airport, con-

struction of a \$144,000 pedestrian trail connecting Coeur d'Alene Avenue to Mullan Trail Park, and a \$750,000 addition to Benewah Community Hospital. Timber Plus, the economic development organization serving the St. Maries area, played a major role in providing the vision and finding the funding for these projects.

- Dell Finnell recently opened Advanced Technical Machining, Inc. Offering CNC design and production with precision milling, the business uses CAD/CAM technology. Its \$80,000 vertical lathe is capable of recreating any item that can be placed on the cutting table. Currently, Advanced Technical Machining is manufacturing grapples equalizers—locally designed units that improve the operation of grapples logging equipment. Finnell hopes to have at least three CNC machines operating by the end of the year.
- Early in 2003, Ray and Valerie Rouse opened St. Joe Bookkeeping & Tax Service in the former Carney Products office building in St. Maries. In addition to providing bookkeeping and tax services, the Rouses also offer private computer lessons.

Bonner County

- The Sandpoint area is losing one of its largest retailers. Kmart announced that it will close the Kmart at the Bonner Mall in Ponderay in late March. The Ponderay store is one of 316 stores nationwide that will close as Kmart attempts to reorganize. About 70 people will lose their jobs when the Ponderay store closes. Kmart and the Sandpoint Job Service are providing them with assistance in making the transition to new jobs. Kmart was the first big-box store to move to Ponderay. When it opened in 1990, it employed 150 people. In 1996, Wal-Mart opened a store in Ponderay, where it employs about 300 people.
- Bonner County's retail sector remains substantial; about 180 retail stores employ more than 1,700 people, while restaurants, bars, and the Coldwater Creek catalog company provides another 1,000 jobs classified as *Retail Trade*.

Kootenai County

- The University of Idaho Research Park in Post Falls recently welcomed two new tenants—Biogenetic Inc. and McGillivray Environmental, LLC. Biogenetic Inc., a developer and seller of medical drug technologies, also serves as a link between technology developers and venture capitalists and helps firms get commercial patents. The company recently moved from Spokane to the research park where it employs 20 people; it may add 10 people during the next year. Biogenetics could assist other park tenants in bringing their technologies to market. McGillivray Environmental, specializing in environmental remediation, opened an office at the park in September. It retains an office in Osburn in the Silver Valley. The business, headed by Kip McGillivray, also provides training to help people meet OSHA standards for hazardous waste operations and emergency response so they can qualify for jobs in Superfund work, meth lab cleanup, and other hazardous waste cleanup. Those jobs typically pay around \$20 an hour.

- AC Data Systems, a manufacturer located at Riverbend Commerce Park in Post Falls, recently introduced a new surge protector for the residential market. AC Data Systems has been making surge protectors for commercial uses since it was founded nine years ago. The new surge protector can be attached to a house's fuse box to protect all household appliances from power surges. With household appliances increasingly featuring high-end electronics, the company is hopeful the surge protectors will be popular. AC Data Systems currently employs 30 people and has the potential to add more workers over the next year.
- Burlington Northern and Santa Fe Railway plans to open its locomotive refueling depot near Rathdrum in 2004. Construction on the building structures is complete. Now construction workers are starting the inside work on the buildings, and soon a crew will begin laying tracks that will connect the depot to the main line that runs between Sandpoint and Spokane. The \$15 million project includes fueling platforms and a 500,000-gallon tank farm. When the depot opens, it will refuel 25 trains a day and employ about 75 people.
- Coeur d'Alene recently saw the birth of these new businesses: Brown's General Store, a 580-square-foot store selling clothing, stationery, handicrafts made by local artists, and other gift items at 416 ½ Sherman Avenue; Sacred Grounds, a delicatessen and espresso shop with a drive-through window in the Conoco station at 356 East Appleway; Petal Pushers, a shop selling fresh-cut flowers, houseplants, jewelry, and household decorations, as well as locally grown perennials in season, at 1844 Government Way; Le Danse, a studio offering yoga and Tai Chi classes, as well as ballet, tap, jazz, hip hop, and other dance classes in the 7-11 mini-mall at Fourth and Best; and a Subway restaurant with a drive-through window and indoor seating in the Chevron station at Government Way and Kathleen Avenue.

Shoshone County

- The Galena Mine near Wallace produced a record 5.3 million ounces of silver in 2002. The mine's owner, Coeur Silver Valley Resources, expects the mine will have another record year of production in 2003. The Galena Mine is the only major mine operating at capacity in the Silver Valley. It has always been a low-cost producer of silver, allowing it to break even at lower prices than most other mines. Recently, the price of silver has been hovering around \$4.60 an ounce—near Galena's breakeven point. (The price at which a mine is forced to shut down generally is considerably lower than its breakeven point, the point at which it turns a profit.) The Galena employs more than 200 people and shares the distinction of being the county's largest private employer with Dave Smith Motors in Kellogg.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate increased in December to 4.0 percent from November's rate of 3.8 percent, as shown in Seaport Table 1. In December 2001, the rate was 4.5 percent. The December decrease in *Total Employment* was unusual because December is traditionally a strong employment month. One of the reasons for the decrease was that holiday hiring lagged behind last year. Starting in October, area retail managers predicted a slow holiday season. Overall, they were right. Stores reported holiday sales were down from last year.

In December, Seaport's *Nonfarm Payroll Jobs* remained at the same level as November 2002, but decreased 1,030 from December 2001. Nearly all sectors contributed to the decreases. Layoffs in key *Manufacturing* sectors started job decreases that rippled through the economy. The economic concern is that because nearly all industries posted decreases, there was little economic growth to help soften the layoffs.

SPECIAL TOPIC

Average Wages

The average wage in Idaho in 2002 rose only 0.7 percent from 2001, the weakest increase in the country, according to recently released data from the U.S. Department of Commerce Bureau of Economic Analysis. (See details in Seaport Table 2.) The wage gap between rural and urban areas narrowed slightly, but city workers still averaged \$5,900 more last year than their rural counterparts. Nationally, the average wage increased 2.6 percent. Two North Central Idaho rural counties that showed wage decreases also have been mired in double-digit percentage unemployment for the past several years—Clearwater and Idaho Counties. Only Nez Perce and Lewis Counties reported wage increases at or above the national increase in North Central Idaho.

AREA DEVELOPMENTS

Clearwater County

- Clearwater Valley Hospital has started construction on an expanded emergency room (ER). Construction of the 2,100-square-foot addition should take approximately seven months. During that time, the ER will continue to provide services. The new addition ex-

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Dec 2002*	Nov 2002	Dec 2001	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	35,140	34,530	33,500	1.8	4.9
Unemployment	1,420	1,300	1,490	9.2	-4.7
% of Labor Force Unemployed	4.0	3.8	4.5	0.2	0.5
Total Employment	33,720	33,230	32,010	1.5	5.3
Unadjusted					
Civilian Labor Force	35,230	34,410	33,570	2.4	4.9
Unemployment	1,470	1,240	1,550	18.5	-5.2
% of Labor Force Unemployed	4.2	3.6	4.6	0.6	0.4
Total Employment	33,760	33,170	32,020	1.8	5.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**					
	25,560	25,560	26,590	0.0	-3.9
Goods-Producing Industries					
Mining & Construction	4,900	4,940	4,960	-0.8	-1.2
Manufacturing	1,250	1,290	1,240	-3.1	0.8
Food Processing	3,650	3,650	3,720	0.0	-1.9
Lumber & Wood Products	70	80	120	-12.5	-41.7
Paper Products	640	640	710	0.0	-9.9
All Other Manufacturing	1,600	1,590	1,630	0.6	-1.8
Service-Producing Industries	1,340	1,340	1,260	0.0	6.3
Transportation	20,660	20,620	21,630	0.2	-4.5
Communications & Utilities	1,290	1,290	1,300	0.0	-0.8
Wholesale Trade	270	270	280	0.0	-3.6
Retail Trade	930	920	960	1.1	-3.1
Finance, Insurance, & Real Estate	4,860	4,830	5,030	0.6	-3.4
Services	1,670	1,660	1,740	0.6	-4.0
Government Administration	6,710	6,730	7,130	-0.3	-5.9
Government Education	2,610	2,610	2,650	0.0	-1.5
	2,320	2,310	2,540	0.4	-8.7
*Preliminary Estimate					
**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month					

Seaport Table 2: Average Wages 2000-2001

	2000	2001	CHANGE	CHANGE
COUNTY				
Clearwater	24,651	24,284	-367	-1.5
Idaho	22,851	22,471	-380	-1.7
Latah	21,868	22,007	139	0.6
Lewis	19,051	19,796	745	3.9
Nez Perce	27,210	27,910	700	2.6
Asotin (Washington State)	23,226	23,794	568	2.4
STATE				
Idaho	27,091	27,268	177	0.7
Washington	37,420	37,849	429	1.1
Oregon	32,222	32,655	433	1.3
UNITED STATES	34,647	35,550	903	2.6

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, December 2002 The employment estimates used to compute the average wage are a job, not person, count. People holding more than one job are counted in the employment estimates for each job they hold.

pands the current two-bay ER into four bays, including one isolation room. It also adds a family waiting area, a doctor's dictation area, and sleeping quarters.

- Construction has begun on Phase I of the Weippe Discovery Center. S&W Construction of Grangeville won the bid at \$136,000. Two hundred years ago Lewis and Clark and the Corps of Discovery met the Nez Perce Indians on the Weippe Prairie in that location. Many of Weippe's community organizations are working together to create a center that will incorporate Lewis and Clark interpretive murals, a library, technology area, small business enhancement center, conference room, and a college outreach center.

Idaho and Lewis Counties

- The Benedictine Sisters at the Monastery of St. Gertrude near Cottonwood are planning a building and renovation project. Plans call for creating a team of contractors and architects to accomplish two tasks: draw up schematics for a new spirituality and retreat center and design a plan for renovations on the historic monastery building. "The number of people who come each year to the monastery for retreat and spiritual rest has nearly doubled since 1999," said Sister Lalande. "In order to expand this ministry and maintain our own contemplative and monastic way of life, we find ourselves needing to create space designed specifically for the work of retreat-making." The new spirituality and retreat center will include meeting and conference rooms, office space, and several bedrooms for guests, oblates, and people who are on retreats. The new structure will also include storage space for the archives and the historical museum. "Our historic monastery building needs to be upgraded too," said Sister Lalande. "We are doing twenty-first century work in a nineteenth century building with many of the original systems still in place."
- Trains may continue to run from Spalding to Cottonwood with the purchase of the former Camas Prairie RailNet line from Craigmont to Cottonwood. BG&CM Railroad has purchased the abandoned line from its intersection with the Camas Prairie RailNet at Spalding through the tunnels and across the trestles to the Camas Prairie. BG&CM now owns the line through Cottonwood to approximately one-half mile south of town to allow room for switching at the grain elevators. The company doesn't plan to purchase any engines at this time. They will instead contract with Camas Prairie RailNet to pull cars when necessary. Salvage has been completed on the railroad line from Cottonwood to Grangeville.
- Syringa General Hospital in Grangeville will receive a \$100,000 grant for an off-site community center. The hospital plans to move EMT equipment and ambulances to the new location to allow space for future expansion at the hospital. The community education center will be made available to community members for various types of training including CPR classes, search and rescue training, and baby-sitter education classes.

Latah County

- The success of Latah County's local economy depends heavily on the University of Idaho (UI). According to a new study on economic impacts of higher education by UI, neighboring Washington State University in Pullman and Lewis-Clark State College in Lewiston combined add \$1 billion in business for Latah, Whitman, Nez Perce, and Asotin Counties per year. Because of UI's growing research arm, the local economy stands to benefit from the war on terrorism through grant money aimed at developing security software, biohazard sensors, and other advances.

Nez Perce and Asotin Counties

- Citing inefficiency at the Port of Portland in the wake of the longshoremen's work stoppage, Potlatch Corporation has shifted the bulk of its shipping business to Puget Sound, bypassing the Port of Lewiston and Snake and Columbia Rivers. The reduction in volume from the Port of Lewiston's second largest shipper prompted the port to lay off four of 10 full-time container yard employees.
- Members of the largest union at Potlatch Corporation's Lewiston site have approved a contract the company's executives believe will make the plant's wages and benefits competitive with similar manufacturers. "We've known for a long time that we have an outstanding work force at this site," said Mark Benson, Potlatch's public affairs director for the Western region. "They have again demonstrated their commitment to making this operation viable." The greatest share of Potlatch Corporation's Lewiston hourly employees are taking a 3.0 percent pay cut for about 19 months of a four-year agreement. In later years of the contract, they will get raises—2.75 percent in September 2004 and the same amount in September 2005. The negotiations occurred in some of the toughest times of Potlatch's existence. Potlatch lost \$200 million in the first three quarters of 2002. It finished \$33.2 million short of profit in 2000 and lost \$80 million in 2001. In November 2002 Potlatch announced it was cutting 51 salaried jobs in Lewiston. The job cuts for the Lewiston site started in 2000 with the elimination of 100 salaried positions. Potlatch froze the wages of its salaried employees in 2001 and 2002, but plans to lift the freeze in 2003.
- Three new businesses have recently located in Nez Perce Plaza in Lewiston. They include Quizno's, a sandwich shop; Black River Coffee, a coffee house; and Sally Beauty Supply, a beauty supply store. These new businesses join a mix of regional businesses and national chains that are filling spaces in the largest new shopping center in the region. Business owners believe shoppers will flock to Nez Perce Plaza and make their businesses thrive.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for December 2002 was 5.1 percent, as shown in Treasure Valley Table 1. This was four-tenths of a percentage point below the November 2002 rate of 5.5 percent and seven-tenths above the December 2001 rate of 4.4 percent. Month-over-month, the number of employed persons increased by 1,300, or 0.6 percent, from November, and the number of unemployed individuals decreased by 800 individuals, or 5.9 percent. The combination of the increasing number of persons employed and the decreasing number of persons unemployed led to an overall decrease of 22,500 individuals, or 8.3 percent, in the *Civilian Labor Force*, from December 2001 to December 2002. The *Civilian Labor Force* figures for December 2002 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

**Treasure Valley Table 2: December 2002
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties**

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	179,237	8,237	4.6	171,001
Adams	1,630	287	17.6	1,343
Boise	2,674	207	7.8	2,467
Canyon	68,999	4,505	6.5	64,493
Elmore	10,095	737	7.3	9,358
Gem	5,747	503	8.7	5,244
Owyhee	4,008	126	3.1	3,882
Payette	10,317	1,062	10.3	9,255
Valley	3,952	369	9.3	3,582
Washington	4,724	549	11.6	4,174
Statewide	687,926	38,550	5.6	649,376

In the Boise City MSA *Nonfarm Payroll Jobs* decreased by 500, or 0.2 percent, from November 2002 to December 2002, while over the year, *Nonfarm Payroll Jobs* decreased by 3,800 in the Boise City MSA. Month-

**Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties**

	Dec 2002*	Nov 2002	Dec 2001	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	248,200	247,700	270,700	0.2	-8.3
Unemployment	12,700	13,500	11,900	-5.9	6.7
% of Labor Force Unemployed	5.1	5.5	4.4		
Total Employment	235,500	234,200	258,800	0.6	-9.0
Unadjusted					
Civilian Labor Force	249,200	249,900	271,200	-0.3	-8.1
Unemployment	13,500	13,200	12,500	2.3	8.0
% of Labor Force Unemployed	5.4	5.3	4.6		
Total Employment	235,700	236,700	258,700	-0.4	-8.9
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	228,900	229,400	232,700	-0.2	-1.6
GOODS-PRODUCING INDUSTRIES					
Construction & Mining	48,500	49,000	51,800	-1.0	-6.4
Manufacturing	15,000	15,300	16,500	-2.0	-9.1
Durable Goods	33,500	33,700	35,300	-0.6	-5.1
Lumber & Wood Products	25,100	25,300	26,900	-0.8	-6.7
Wood Buildings & Mobile Homes	3,000	3,000	3,100	0.0	-3.2
Other Lumber & Wood Products	800	800	800	0.0	0.0
Fabricated Metal Products	2,200	2,200	2,300	0.0	-4.3
Ind. & Com. Mach. & Computer Equip.	1,200	1,200	1,100	0.0	9.1
Electronic & Other Elect. Equip. & Comp.	6,500	6,600	7,400	-1.5	-12.2
Transportation Equipment	11,100	11,200	11,800	-0.9	-5.9
Other Durable Goods	1,600	1,600	1,700	0.0	-5.9
Nondurable Goods	1,700	1,700	1,800	0.0	-5.6
Food & Kindred Products	8,400	8,400	8,400	0.0	0.0
Canned Cured & Frozen Foods	5,700	5,600	5,700	1.8	0.0
Printing, Pub & Allied Products	1,600	1,600	1,600	0.0	0.0
Other Nondurable Goods	1,900	1,900	1,900	0.0	0.0
SERVICE-PRODUCING INDUSTRIES	800	900	800	-11.1	0.0
Trans., Comm., & Public Utilities	180,400	180,400	180,900	0.0	-0.3
Transportation	12,300	12,300	12,100	0.0	1.7
Comm. & Elec. Gas & Sanitary Svcs.	6,800	6,800	6,900	0.0	-1.4
Trade	5,500	5,500	5,200	0.0	5.8
Wholesale Trade	56,500	56,400	57,500	0.2	-1.7
Durable Goods	12,400	12,400	12,600	0.0	-1.6
Nondurable Goods	7,700	7,600	7,700	1.3	0.0
Retail Trade	4,700	4,800	4,900	-2.1	-4.1
General Merchandise Stores	44,100	44,000	44,900	0.2	-1.8
Foods Stores	6,300	6,300	6,200	0.0	1.6
Eating & Drinking Places	7,200	7,300	7,600	-1.4	-5.3
Other Retail Trade	15,100	15,100	15,600	0.0	-3.2
Finance, Insurance, & Real Estate	15,500	15,300	15,500	1.3	0.0
Services	11,800	11,600	11,800	1.7	0.0
Business Services	62,600	63,200	62,800	-0.9	-0.3
Health Services	13,500	13,700	15,100	-1.5	-10.6
Hospitals	19,400	19,400	18,900	0.0	2.6
Eng. Acct., Res, Mgmt., & Related	9,300	9,300	8,900	0.0	4.5
Other Services	5,700	5,600	5,100	1.8	11.8
Government	24,000	24,500	23,700	-2.0	1.3
Federal Government	37,200	36,900	36,700	0.8	1.4
State Government	5,400	5,400	5,300	0.0	1.9
Education	13,700	13,400	13,800	2.2	-0.7
Administration	5,100	4,800	4,800	6.3	6.3
Local Government	8,600	8,600	9,000	0.0	-4.4
Education	18,100	18,100	17,600	0.0	2.8
Administration	12,100	12,100	11,700	0.0	3.4
	6,000	6,000	5,900	0.0	1.7

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

over-month, *Goods-Producing Industries* lost 500 jobs; job decreases outpaced job openings in *Food & Kindred Products* (100). Other decreases were noted in *Construction & Mining*, (-300), *Industrial Communications Machinery & Computer Equipment Manufacturing* (-100), *Electronic & Other Electrical Equipment & Components Manufacturing* (-100), and *Other Nondurable Goods Manufacturing* (-100). Year-over-year, *Goods-Producing Industries* lost 3,300 jobs, with *Fabricated Metal Products Manufacturing* the only industry to experience a gain (100). Job losses occurred in *Construction & Mining* (-1,500), *Other Lumber & Wood Products Manufacturing* (-100), *Industrial Communications Machinery & Computer Equipment Manufacturing* (-900), *Electronic & Other Electrical Equipment & Components Manufacturing* (-700), *Transportation Equipment Manufacturing* (-100), and *Other Durable Goods Manufacturing* (-100).

In *Service-Producing Industries* the number of jobs created from November to December 2002 equaled the number of jobs lost, with job gains noted in *Durable Goods Wholesale Trade* (100), *Other Retail Trade* (200), *Finance, Insurance, & Real Estate* (200), *Engineering, Accounting, Research, Management & Related Services* (100), and *State Government Education* (300). Job losses occurred in *Nondurable Goods Wholesale Trade* (-100), *Food Stores* (-100), *Business Services* (-200), and *Other Services* (-500). Year-over-year *Service-Producing Industries* lost 500 jobs, with job losses in *Transportation* (-100), *Nondurable Goods Wholesale Trade* (-200), *Food Stores* (-400), *Eating & Drinking Places* (-500), *Business Services* (-1,600), and *State Government Administration* (-400) outpacing job gains in *Communications & Electricity, Gas & Sanitary Services* (300), *General Merchandise Stores* (100), *Health Services* (500) primarily *Hospitals* (400), *Other Services* (300), *Federal Government* (100), *State Government Education* (300), *Local Government Education* (400), and *Local Government Administration* (100). The overall loss of jobs over the year is consistent with the downturn and slow recovery that the national economy has been experiencing since January 2001.

AREA DEVELOPMENTS

Boise City MSA

- Ninety Buy Idaho member businesses participated in a show at the Idaho Statehouse in mid-January. Legislators, government workers, and visitors toured the Capitol building and learned about the products and services of the Idaho businesses on display. Buy Idaho is a non-profit, non-tax-supported association of Idaho business, industry, agriculture, education, and governmental entities working together to promote Idaho products and services.

- The Business and Technology Expo, held in late January in Boise, showed a 25 percent increase in exhibitors over 2002. Event organizers cited an increased optimism about the economy as one of the reasons more exhibitors participated in the event. People who attended the Expo had an opportunity to learn basic information about various businesses as well as see new trends and products in the market.
- In early January, Kelly Matthews, vice-president and chief economist for Wells Fargo, discussed the forecast for the 2003 economy at the Wells Fargo Economic Symposium in Boise. Matthews made the following predictions for the Idaho economy in 2003: personal income will rise 4.5 percent, up from 2002; nonagricultural employment will increase 1.1 percent, compared to a loss in 2002; the unemployment rate will be 5.5 percent, virtually unchanged from 2002; housing construction will slow with a 10 percent decrease in the construction of single-dwelling units from 2002; and retail will rise 4.0 percent.
- Boise State University (BSU) has experienced record enrollment in the past few years, but BSU President Charles Ruch stated that the school couldn't sustain the growth unless additional money is provided by the State. Suggestions for cutting the current expansion rate include increasing the admission standards and assessing the current student population. Students who are considered academically at-risk may be asked to consider other educational options.
- Albertson College of Idaho (ACI) announced in early December that tuition would be lowered in an effort to draw more students. School officials hope to attract an additional 150 students. After ACI announced a budget deficit of \$6 million in 2002, the school cut costs by \$2 million and expected to raise the additional \$4 million in fund-raising campaigns and donations. At the end of 2002 unrestricted donations were up 148 percent from the previous year.
- American Eagle Airlines announced in late December that its national affiliate, American Airlines, would shut down its Boise operation. The daily trips to Dallas from Boise will come to an end, and 11 employees will be affected. The airline industry's poor financial standing is cited as the reason for the closure.
- The ParkCenter KMart in Boise is one of 326 KMart stores nationwide that will close by April 30. The store currently is holding a liquidation sale that will end when the store officially closes.

- The Garden City Community Clinic opened in mid-December to fill a niche in Boise's medical community. The clinic provides diagnoses and treatments at no charge to patients with low income and inadequate health insurance. Genesis World Mission operates the clinic.
- Associated Food Stores closed its warehouse in Boise on Market Street in early December. The warehouse supplied groceries to about 95 small, independent grocery stores in Boise and surrounding rural areas. These areas will now be serviced by the company's new warehouse in Farr West, Utah. Between 65 and 70 employees were affected by the closure.
- Construction has started on a new retirement community in Meridian. Meadow Lake Village, located at 3805 East Franklin Road, is currently taking reservations for the first 150 houses that are already under construction. Meadow Lake Village will include a community center, golf course, a small lake, and a park. Roads are already complete. Three homes are currently available for tours. See www.meadowlakevillage.com for more information.
- Micron Technology and Hewlett-Packard are among the top ten companies in the United States to be awarded patents in 2002. Micron Technology, the third highest company on the list, was awarded 1,833 patents by the U.S. Patent and Trademark Office, which is 11.5 percent more than it was awarded in 2001. Hewlett-Packard, the ninth highest, was awarded 1,385 patents, which is more than 40 percent higher than the number it was awarded in 2001. IBM and General Electric held the number one and two positions, respectively, for number of patents awarded to a single company.
- Micron Technology announced a deal with Given Imaging in January that will allow Micron to be the exclusive developer and supplier of image sensors over the next five years for Given's camera-in-a-pill.
- In 2003, MicronPC changed its name to MPC. The company also announced in late January that it won a \$12 million, three-year contract with the U.S. Department of Veterans Affairs (VA) to supply desktop computers to VA sites in northern and central California, Nevada, and Hawaii.
- The Eleventh Avenue Underpass opened in late January in Nampa. Local businesses and citizens of Nampa are grateful for the opening, one of the main north-south routes in Nampa that was closed for more than a year for the project. A crowd of more than 1,000 people turned out for the opening in which 80 classic cars paraded through the newly-opened underpass.
- In late December a new paramedic station opened at 912 Specht Street near I-84 in Caldwell. The station was funded by a \$1.66 million voter-approved override levy. The money also funded a substation in Nampa, two new ambulances, and additional support staff.
- Several business have opened in the Boise City MSA recently, including: Pick Up The Pace exercise center in Nampa, Just Toast (restaurant) in downtown Boise, Boise Book & Game Co. in the Sonna Building in downtown Boise, Panda Express' fourth eatery in the Treasure Valley, a Wells Fargo full-service banking location near the Edwards Cinema Complex in Nampa, two new Sonic drive-ins in Ada County, the Music Theatre of Idaho's new permanent location in Nampa, Grandma's Treasures thrift shop at the Boise Senior Activities Center, Frosty Palace (reopening) at 1302 Paynter in Caldwell, the Red Feather Lounge in downtown Boise, two Baja Fresh Mexican Grill locations in Boise and Meridian.
- Several businesses are planning to open in the area soon. Gold's Gym announced plans to open two additional Treasure Valley locations in 2003, including one in east Boise and one in Nampa, Fitness 19 announced plans to open two Boise workout centers in 2003, Tacoma Screw Product announced plans to open a store in Boise in 2003, Eldredge's Furniture & Mattresses announced plans to open a Boise outlet in early March, Subway announced plans to open another franchise in Caldwell at the corner of Tenth Avenue and Chicago Street in spring 2003, creating 12 jobs, and Mountain West Bank announced plans in January to open its fifth branch in the area in early March.
- Several business closings have been announced. McDonald's closed its downtown Boise location in late December, Victors Restaurant and Lounge closed in Caldwell in late January, Joe's All American Grill and Sixth & Main at Joe's closed in mid-January in downtown Boise.
- Other business happenings in the Boise City MSA in the past few months include: the Whittenberger Foundation awarded \$30,000 towards the construction of a new YMCA building in Caldwell, construction started on a new office building on Shoreline Drive in Boise, Idaho Central Credit Union announced plans to start construction on a Meridian branch in spring 2003, Boise City Parks

and Recreation Department announced plans to build an educational facility in north Boise in 2003, Rock, Paper, Scissors was renamed Scraps 'n Scissors and held a reopening ceremony in mid-December, the Eighth Street Marketplace changed ownership in early January, and the WorkSource Career Center extended its hours from 8:00 a.m. to 8:30 p.m., Monday through Thursday.

Adams County

- Boise Corporation shut down all of its Idaho timberland to logging in mid-November instead of the end of December as they normally do. The land reopened in January.

Boise County

- Bogus Basin opened on December 19 for the 2002-2003 season, however, early-season rain and too little snow may result in a less profitable season for the resort this year as in previous years. The mountain has been operating under limited conditions for part of the season because of weather conditions.

Gem County

- The Shadow Butte Development Corporation announced in early January that it would convert the former BMC West building on West Main Street in Emmett into a second location for Liberty Canyon Boys Ranch. The proposed remodeling of the building will allow for a 36-bed facility and would employ about 36 people. Funds will be provided by an Idaho Department of Commerce Rural Development Block Grant.
- Other business happenings in the past few months in Gem County include the ribbon cutting of Bayside Printing and Design at 103 South Commercial Avenue in Emmett, the ribbon cutting of Tomorrow's Hope in Emmett, and the expansion of Community Partnerships of Idaho, Inc.'s Adult Developmental Center located at 616 Washington Avenue in Emmett.

Payette County

- In early January the City of Fruitland took over the city's ambulance service. The City of Fruitland now runs Payette County Paramedics. The crew, ambulances, and main offices are now located at Fruitland City Hall.
- Other business happenings in Payette County in the past few months include: the Apple Bin was recognized as the Fruitland Chamber of Commerce's Business of the Year, Kelly Whiting held a grand opening for his new office at 425 South Whitley in Payette, the Airporter Shuttle Company held an official ribbon cutting in late No-

vember, and the Payette School District announced in late December that it would hold a third bond election in March to build a new middle school.

Valley County

- Brundage Mountain Ski Resort opened during the third week of December for the 2002-2003 ski season. In early January Brundage held an open house to discuss proposed changes to the resort including five new chairlifts, additional ski trails, a snow tubing facility, a mountaintop restaurant, additional skier-service facilities, expanded parking facilities, and additional trails and infrastructure to support the improvements.
- Construction has started on an upscale recreational vehicle (RV) park near the intersection of Mission Street and Deinhard Lane on the North Fork of the Payette River in McCall. The McCall RV Park facility will include space for approximately 240 high-end RVs and a complex of buildings to include a reception hall, banquet room, industrial kitchen, swimming pool, sauna, and massage room that will all be connected by breezeways. The facility will be built in three phases over the next few years.
- In other business news in Valley County, the mobile MRI equipment that travels to McCall on a weekly basis expanded its visits to McCall Memorial Hospital to two times per week; WestRock, a planned resort development near McCall, officially changed its name to Tamarack in December 2002 with the new slogan: "Tamarack, Trailhead to Discovery;" the McCall Ice Rink and Event Center raised enough money to finish the construction of the facility, but approximately \$150,000 is still needed to purchase equipment for the facility; McCall Memorial Hospital received an \$11,000 grant awarded by the State that will be shared by EMS groups from McCall, Donnelly, Meadows Valley, and Riggins.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Magic Valley Labor Market Area (LMA) in December 2002 was 3.9 percent. This is one-tenth of a percentage point lower than November 2002 and four-tenths of a percentage point lower than December 2001. The *Civilian Labor Force* in December 2002 was 50,770—3.2 percent greater than the year before.

The sectors that showed significant gains year-over-year were *Manufacturing-Durable Goods*, *Other Nondurable Goods*, and *Wholesale Trade* with increases of 7.1 percent, 3.1 percent, and 3.6 percent, respectively. Sectors that had decreases over the year were *Services*, and *Government-Education* with losses of 1.7 percent and 2.5 percent, respectively.

The unemployment rate continues to be one of the lowest in the state and *Nonfarm Payroll Job* growth is positive. Holiday hiring was good, thus the increases in most sectors from November 2002 to December 2002. The overall economy is relatively healthy despite recessionary pressures.

MAGIC VALLEY 2003 OUTLOOK:

Indicators to Watch

The year 2002 was good for the Magic Valley LMA. The number of *Nonfarm Payroll Jobs* increased by 0.8 percent and unemployment for the year was a low 3.9 percent. Dell Computer Company opened in February 2002 and by year-end had 727 workers. New retailers opened in the North Canyon Project and created hundreds of full- and part-time retail jobs. The only major problem that developed was in the nearby Mini-Cassia area where the J.R. Simplot Company announced that it would be closing its Heyburn plant by April 2004. This announcement affects over 600 workers; the first permanent layoff of 169 workers took place in October 2002. The closure will also affect 24,000 acres of contract potatoes, and farmers might have to change crop mix to make a viable in-

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	Dec 2002*	Nov 2002	Dec 2001	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	50,770	49,730	49,180	2.1	3.2
Unemployment	1,990	2,010	2,130	-1.0	-6.6
% of Labor Force Unemployed	3.9	4.0	4.3		
Total Employment	48,780	47,720	47,050	2.2	3.7
Unadjusted					
Civilian Labor Force	50,590	49,930	48,940	1.3	3.4
Unemployment	2,150	1,910	2,280	12.6	-5.7
% of Labor Force Unemployed	4.2	3.8	4.7		
Total Employment	48,440	48,020	46,660	0.9	3.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**					
Goods-Producing Industries	7,010	7,020	6,860	-0.1	2.2
Mining & Construction	1,800	1,840	1,770	-2.2	1.7
Manufacturing	5,210	5,180	5,090	0.6	2.4
Durable Goods	900	880	840	2.3	7.1
Nondurable Goods	4,310	4,300	4,250	0.2	1.4
Food Processing	3,300	3,310	3,270	-0.3	0.9
Other Nondurable Goods	1,010	990	980	2.0	3.1
Service-Producing Industries	32,350	31,830	32,420	1.6	-0.2
Transportation, Comm., & Utilities	2,710	2,730	2,690	-0.7	0.7
Wholesale Trade	2,280	2,270	2,200	0.4	3.6
Retail Trade	8,310	8,230	8,230	1.0	1.0
Finance, Insurance, & Real Estate	1,280	1,270	1,270	0.8	0.8
Services	10,410	10,000	10,590	4.1	-1.7
Government Administration	3,870	3,900	3,860	-0.8	0.3
Government Education	3,490	3,430	3,580	1.7	-2.5

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

come. Despite this significant setback, the Magic Valley economy was a top performer in 2002. With such a good year in 2002, what does 2003 hold in store for the Magic Valley? To answer that question several indicators must be closely watched in order to make valid predictions.

Nonfarm Payroll Jobs are one of the most important indicators of economic strength. The Magic Valley has weathered recessionary pressure well, but it has not been immune. Two factors greatly aided job growth in 2002: Dell Computer Company and the new retail and eating establishments in north Twin Falls. These added hundreds of jobs. It is expected that *Nonfarm Payroll Jobs* will decrease slightly, perhaps 0.5 to 1.0 percent, in 2003. The reason for the projected decline is that there appears to be a lull in retail growth, and it is uncertain whether another large employer such as Dell can be recruited. Natural attrition and small business closures will cause a drain that will probably not be offset by new job creation, hence a decrease in the overall number of jobs.

The seasonally adjusted unemployment rates are also key indicators for measuring growth. In 2002, the overall rate for the year was 3.9 percent. This was second only to the Bonneville LMA as the lowest in the state. It is expected that the unemployment rate will rise to approximately 4.5 percent in 2003. The reasons for the rise are that dairy growth has flattened, especially in Twin Falls, Gooding, and Jerome Counties, and so the downward pressure on unemployment rates from this source will let up. The retail sector showed some decline, especially late in 2002, and employers seem to be cautious in hiring. It is expected that this caution will continue into spring hiring. On the plus side, there are some labor shortages in such industries as health care and fast food. Given the large number of new housing permits in 2002, it is expected that there will be an increased demand for general laborers and specialized workers such as electricians, dry wallers, and carpenters. The rise to 4.5 percent would be in keeping with the traditional unemployment rate for the area and should still be one of the lowest unemployment rates in the state.

Water outlook and agricultural commodity prices remain a huge variable factor. The water year at the end of January was disappointing. The water year generally lasts from the first part of December to the first part of March. Therefore, the water year is two-thirds over. The Magic Valley's major source for water is the Henry's Fork area in Southeastern Idaho and western Wyoming where the water levels are far below normal. The only local areas that have had a normal water year so far are the Little and Big Wood River drainages, which supply Little Wood and Magic Reservoirs. Lack of water can change crop mixes and affect yield and quality of crops. For example, potatoes and sugar beets are long season crops, and this might affect both plantings and yields. Also, there might not be as many cuttings of hay if water is short. Commodity prices are also uncertain. Last year milk prices were low, and such crops as potatoes were unexpectedly high. Milk prices are expected to remain relatively low, but should be a little higher than in 2002. The price of open market potatoes could be significantly lower because with fewer potato contracts, demand for fresh pack potatoes will probably decline. Beef, lamb, and pork prices should be similar to 2002, as will bean, pea, wheat, and other grain prices. Hay prices will probably be higher if water is short because supply will be lower.

Consumer confidence is the final area to be examined, which is very difficult to assess because much of it relies on overall psychological well being. In 2002 consumer confidence was high in the Magic Valley. Retail sales were strong and people continued to spend, although the demand for big ticket items started to decline in the latter part of the year. Consumers are expected to be more cautious in 2003. Several factors contribute to this assertion. On the national scene, impending

war with Iraq and the volatile bear stock market combine to make consumers cautious about spending money or obtaining loans for large ticket items. If interest rates remain low, this might lessen the effect of the negative influences, but not enough to change the negative trend. In Idaho the state budget deficit situation contributes to consumer uncertainty. Finally, the announcement of the Simplot closure in Heyburn has the potential to negatively affect consumer confidence as more layoffs and closures loom, especially in the Mini-Cassia area.

In summary 2003 is not expected to be the breakout year that 2002 was in the Magic Valley, but the Magic Valley will continue to be a state leader in new job creation and unemployment.

AREA DEVELOPMENTS

Twin Falls County

- Muggers Brew Pub, a pioneer Old Towne Twin Falls business in the downtown area, closed in late January. The business cited increased competition, cash flow problems, and an unsuccessful marketing plan as reasons for the closure. The closure has displaced 20 full- and part-time employees.

Cassia and Minidoka Counties

- Cortland Enterprises has donated the 35,000-square-foot Rite Aid building to the City of Burley for economic development purposes. The Burley City Council agreed unanimously to accept the offer, thereby removing the building from the property tax rolls. The city is now responsible for minor repairs, snow removal, and water and sewage services. The Southern Idaho Economic Development Organization and the Mini-Cassia Development Commission are hoping to market the building to sell or lease as a potential call center site, but are also exploring marketing the property to all types of businesses. In either case, the hope is to attract an employer who can offer new jobs to help offset the job losses that occurred with the Simplot closure. The City of Burley will provide closing costs of \$12,000 to \$15,000 on the donated building; however, the value of the building to economic development efforts is expected to far exceed the closing costs and cost of removing the building from tax rolls.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The Pocatello City Metropolitan Statistical Area (MSA), which includes all of Bannock County, had a seasonally adjusted unemployment rate of 5.3 percent in December 2002, a decrease of four-tenths of a percentage point from November 2002 when the rate was 5.7 percent. This is the lowest the unemployment rate has been since May 2002 when it was 5.1 percent. Contributing to the reduction was a decline in the number of unemployed individuals, from 2,290 in November 2002 to 2,120 in December 2002. Additional hiring for the holiday season, coupled with some increased construction activity in the area, contributed to increased employment in December 2002 over November 2002. Employment increased a full percentage point, from 37,790 in November 2002 to 38,150 in December 2002. At the same time, individuals entered the labor force at a much slower rate (five-tenths of a percentage point), but found it easier to find jobs in December.

Unemployment rates have increased over the past two years in the United States, Idaho, and the Pocatello City MSA. In December 2000 the U.S. unemployment rate, at 4.7 percent, was near a record 20-year low. Idaho's unemployment rate was near the U.S. rate at 4.6 percent and the Pocatello City MSA's rate matched the U.S. rate at 4.7 percent. By December 2001 the recession drove the U.S. unemployment rate up to 5.4 percent, the state unemployment rate to 5.5 percent, and the Pocatello City MSA's rate to 5.7 percent. In December 2002 the U.S. unemployment rate increased to 5.6 percent, two-tenths of a percentage point higher than in December 2001, and Idaho's December 2002 unemployment rate increased one-tenth of a percentage point over December 2001 to 5.6 percent. The Pocatello City MSA's unemployment rate fell four-tenths of a percentage point from December 2001 to 5.3 percent, but remained higher than it had been since 1995.

Nonfarm Payroll Jobs declined by 120 from 33,330 in November 2002 to 33,210 in December 2002 as shown in Southeast Table 1. The job reductions were mostly in *Government Education*, which declined by

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Dec 2002*	Nov 2002	Dec 2001	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	40,270	40,080	39,060	0.5	3.1
Unemployment	2,120	2,290	2,230	-7.4	-4.9
% of Labor Force Unemployed	5.3	5.7	5.7		
Total Employment	38,150	37,790	36,830	1.0	3.6
Unadjusted					
Civilian Labor Force	41,100	41,120	39,720	0.0	3.5
Unemployment	2,250	2,240	2,350	0.4	-4.3
% of Labor Force Unemployed	5.5	5.4	5.9		
Total Employment	38,750	38,880	37,370	-0.3	3.7
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	33,210	33,330	33,320	-0.4	-0.3
Goods-Producing Industries	4,040	4,120	4,160	-1.9	-2.9
Mining & Construction	1,470	1,520	1,510	-3.3	-2.6
Manufacturing	2,570	2,600	2,650	-1.2	-3.0
Service-Producing Industries	29,250	29,210	29,160	0.1	0.3
Transportation, Comm., & Utilities	1,880	1,870	1,840	0.5	2.2
Wholesale Trade	1,410	1,400	1,400	0.7	0.7
Retail Trade	6,830	6,810	6,880	0.3	-0.7
Finance, Insurance, & Real Estate	1,750	1,750	1,810	0.0	-3.3
Services	8,090	8,010	8,370	1.0	-3.3
Government Administration	3,760	3,770	3,450	-0.3	9.0
Government Education	5,450	5,600	5,410	-2.7	0.7

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

150 jobs. The number of jobs in the *Goods-Producing industries* declined by 80 from 4,120 in November 2002 to 4,040 in December 2002. The 80-job loss was split between *Construction* (50) and *Manufacturing* (30). The number of jobs in the *Service-Producing Industries* increased by 40 from 29,210 in November 2002 to 29,250 in December 2002. Only two industries suffered job losses in December 2002 from November 2002: *Government Administration* (10) and *Government Education* (150). The job reductions in *Government Education* were exclusively in jobs at Idaho State University and were normal reductions that frequently occur as fall semester wraps up. *Services* added 80 jobs from November 2002 to December 2002, a normal seasonal increase because of activity related to the holiday season.

From one year ago, *Nonfarm Payroll Jobs* decreased by 110, dropping from 33,320 in November 2002 to 33,210 in December 2002. The *Goods-Producing Industries* lost 120 jobs over the year and decreased from 4,160 jobs in December 2001 to 4,040 in December 2002. Job losses were split between *Construction* (40) and *Manufacturing* (80). These job reductions do not reflect the manufacturing jobs lost from the Astaris closure because the jobs are counted in Power County, not Bannock County. Job increases outpaced job losses in the *Service-Producing Industries* for an overall gain of 90 jobs, increasing from 29,160 in December 2001 to 29,250 in December 2002. One notable change in jobs was the relatively high decrease in *Services* compared to the relatively high increase in *Government Administration*. The change was because the two Pocatello hospitals merged and more than 300 jobs moved from *Services* to *Government Administration*.

tion. Despite the opening of several new retail businesses, *Retail Trade* lost 50 jobs from December 2001 to December 2002. The decrease was because many employers chose to work their employees more hours, thereby reducing the number of employees needed. Also this year, employers began laying off seasonal workers earlier than they normally do because shoppers heavily curtailed their shopping after the Thanksgiving weekend.

SPECIAL TOPIC

Reporting Changes in Southeast Idaho Employment

Labor Market Areas (LMAs) and Metropolitan Statistical Areas (MSAs) are designated by the U.S. Bureau of Labor Statistics and the President's Office of Management and Budget (OMB), respectively. An **LMA** is defined as: *an area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment within a reasonable distance or can readily change employment without changing their place of residence.*

An **MSA** is defined as: *areas that have either a city with a population of at least 50,000 or an urbanized area of at least 50,000 and a total metropolitan area of at least 100,000.*

Until 1995 the official LMA for Idaho's Southeast region was the Bannock/Power LMA and included both Bannock and Power Counties. Labor force data and *Nonfarm Payroll Jobs* from both counties were combined and reported as one LMA. In 1994 Pocatello's population reached the 50,000 mark and by 1995, the OMB had officially designated Pocatello as an MSA. The official Pocatello City MSA was defined as Bannock County and did not include Power County even though the relationship between the two counties remained the same. In 1996 the Idaho Department of Labor began reporting labor force data and *Nonfarm Payroll Jobs* for the Pocatello City MSA and discontinued the combined Bannock/Power LMA.

This year, along with the change from the old Standard Industrial Coding System (SIC) to the new North American Industrial Classification System (NAICS), the Department will also make the change back to a combined Bannock/Power LMA for reporting purposes in *Idaho Employment*. This change is being made to allow reporting at a more detailed level and because the two counties still share an economically integrated geographic area within which individuals can reside and find employment within a reasonable distance or can readily change employment without changing their place of residence. Labor market information will continue to be available on a county basis. We hope this change will provide valuable labor force and nonfarm job information with the added detail this new reporting system will provide. This change will occur in the combined March-April 2003 issue of *Idaho Employment*, which will report January 2003 data.

AREA ECONOMIC DEVELOPMENT ACTIVITY

January through October Construction

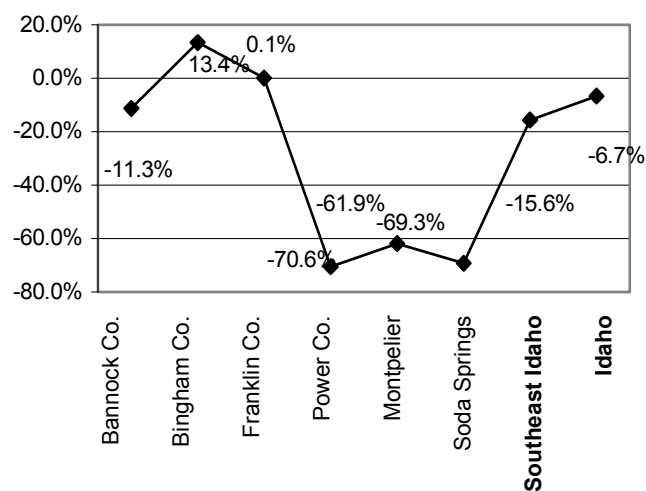
According to Wells Fargo Bank's *Idaho Construction Report – October 2002*, Southeast Idaho construction dropped 11 percent in January through October 2002 from January through October 2001. *Southeast Idaho Chart 1: 2000-2001*

Percent Change in Construction Activity shows the percentage change in construction activity during January through October 2002 compared to January through October 2001. Residential construction increased in every county (11 percent), but the overall decrease was driven by reductions in nonresidential construction activity, which fell 49.6 percent. Nonresidential construction decreased in every county except Bingham where it increased 63.8 percent. The construction of several new office buildings and a new retail outlet led to the increase.

In Bannock County residential construction outpaced 2001's level by 9.8 percent, but the county fell behind the 2001 nonresidential construction by 41 percent. Bingham County increased in both residential (8.9 percent) and nonresidential (63.8 percent) construction. In Franklin County, a decrease in nonresidential construction (36.9 percent) outpaced an increase in residential construction (7.9 percent). Although Power County increased its residential construction 44.9 percent over 2001, it did not keep pace with the decrease of nonresidential construction, which decreased 81.9 percent. Montpelier City and Soda Springs City both experienced increased residential construction activity in 2002 over 2001, but decreased nonresidential activity outpaced those gains. Both cities ended the January through October period down 61.9 percent and 69.3 percent, respectively.

Major construction projects started in November and December of 2002 should boost construction values to end the year on a more positive note.

Southeast Idaho Chart 1: 2000-2001 (Jan-Oct) Percent Change in Construction Activity



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NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

December's seasonally-adjusted unemployment rate for the Bonneville Labor Market Area (LMA) remained constant over the month at 3.7 percent, and dropped six-tenths of a percentage point from the same time last year as seen in Northeast Table 1. Small changes over the month included a decrease of 240 people from the *Civilian Labor Force*, and a decrease of 50 unemployed people. However, the year-over-year scenario shows an increase of 2,900 persons in the *Civilian Labor Force* and a reduction of 370 persons in the number unemployed. Over 1,800 of the growth in the *Civilian Labor Force* was in Bonneville County, and the combination of Bingham and Jefferson Counties added over 1,100 persons. This growth, along with the decrease in the unemployment rate, shows that the LMA continues to have sustainable jobs for its work force. The unemployment rate for Idaho Falls, the largest city in the LMA, decreased one-tenth of a percentage point over the month and four-tenths of a percentage point from December 2001.

Bonneville County had the lowest unemployment rate in the LMA at 3.4 percent in December, while Jefferson and Butte Counties were only a few tenths of a percentage point higher. (See State Table 1: Labor Force on page 3 for all December county and LMA unemployment rates.) Bingham County had the highest unemployment rate for the LMA at 4.4 percent. Unemployment rates for the other Northeast Idaho counties not included in the LMA remained relatively stable; Clark County (4.5 percent), Madison County (2.0 percent), and Teton County (3.4 percent) changed very little in the month-over-month and year-over-year comparisons. The unemployment rates in Custer and Lemhi Counties decreased 1.1 and 1.2 percentage points, respectively, while the rate in Fremont County decreased 1.0 percentage point from December 2001.

Nonfarm Payroll Jobs increased by 180 from November to December 2002 as job gains in *Service-Producing Industries* (590) outweighed losses in *Goods-Producing Industries* (410). Losses in *Construction*, almost 500, were heavy as favorable weather permitted many jobs to continue into the

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Dec 2002*	Nov 2002	Dec 2001	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	82,950	83,190	79,960	-0.3	3.7
Unemployment	3,070	3,120	3,440	-1.6	-10.8
% of Labor Force Unemployed	3.7	3.7	4.3		
Total Employment	79,880	80,080	76,530	-0.2	4.4
Unadjusted					
Civilian Labor Force	82,040	83,080	78,980	-1.3	3.9
Unemployment	3,140	2,800	3,490	12.1	-10.0
% of Labor Force Unemployed	3.8	3.4	4.4		
Total Employment	78,900	80,270	75,490	-1.7	4.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**					
Goods-Producing Industries	10,180	10,590	9,240	-3.9	10.2
Mining & Construction	4,550	5,030	3,920	-9.5	16.1
Manufacturing	5,630	5,560	5,320	1.3	5.8
Food Processing	2,800	2,810	2,910	-0.4	-3.8
Ind. & Com. Mach. & Computer Equip.	590	580	480	1.7	22.9
All Other Manufacturing	2,240	2,170	1,930	3.2	16.1
Service-Producing Industries	53,710	53,120	53,180	1.1	1.0
Transportation, Comm., & Utilities	2,430	2,370	2,380	2.5	2.1
Wholesale Trade	5,150	5,100	5,640	1.0	-8.7
Retail Trade	11,380	11,530	11,150	-1.3	2.1
Finance, Insurance, & Real Estate	1,980	2,000	1,890	-1.0	4.8
Services	22,170	21,450	21,370	3.4	3.7
Government Administration	5,190	5,110	5,520	1.6	-6.0
Government Education	5,410	5,560	5,230	-2.7	3.4
*Preliminary Estimate					
**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month					

month of November; these layoffs are normally seen in October. Combined losses in *Retail Trade* and *Government Education* equaled 300 jobs as seasonal hiring has diminished over the past several years with stores using full-time employees instead of hiring part-time help. A large gain of 720 jobs occurred in *Services*; *Health Services*, *Business Services*, and *Social Services* continued to add jobs.

Year-over-year, *Nonfarm Payroll Jobs* increased by 1,470. Gains in *Goods-Producing Industries* (940) were almost double that of gains in *Service-Producing Industries* (530). *Services* increased by 800 jobs as commercial growth continued in the LMA. *Construction* grew by 630 while large projects, such as the expansion of Anheuser Busch and developments around Sunnyside Road, continued. Residential construction also showed job growth, particularly in Bonneville County. *Manufacturing* showed large growth of 310 jobs with gains in *Industrial & Commercial Machinery & Computer Equipment* and *All Other Manufacturing* outweighing losses in *Food Processing*. Losses were noted in *Wholesale Trade* and *Government Administration* because state budget cuts led to decreased employment.

SPECIAL TOPIC

2002 Wage Survey for Eastern Idaho

The 2002 *Idaho Occupational Employment & Wage Survey* was released at the end of January with the newest wage figures for Eastern Idaho, excluding

the Pocatello Metropolitan Statistical Area (MSA). Because Bannock County is recognized as the Pocatello MSA, a separate survey covers that county. Therefore, the Eastern Idaho survey consists of 15 counties; Bear Lake, Bingham, Bonneville, Butte, Caribou, Clark, Custer, Franklin, Fremont, Jefferson, Lemhi, Madison, Oneida, Power, and Teton Counties. The survey covers 22 of the 23 major occupational groups using the *Standard Occupational Classification* (SOC) System recognized nationally by the U.S. Department of Labor Bureau of Labor Statistics. The survey period is from October 2001 through August 2002.

Northeast Idaho Table 2: Highest Paying Occupations provides some highlights of the data gathered about Northeast Idaho in the wage survey.

Northeast Idaho Table 2: Highest-Paying Occupations	
Occupation	Hourly Salary
Family & General Practitioners	\$65.71
Speech-Language Pathologists	\$43.64
Physical Scientists, All Other	\$36.23
Engineers, All Others	\$35.33
Computer Software Engineers	\$35.26
Computer & Information Sys Mgr	\$35.03
Pharmacists	\$33.07
Natural Sciences Managers	\$32.78
Education Administrators Preschool & Child Care Center/Program	\$34.44
Property, Real Estate, & Community Association Managers	\$33.00

A few wages in the education system are not listed because of the way in which these occupations are compensated and the time frame in which work is performed throughout the year. Northeast Idaho Table 3: Number of Workers by Occupation shows the occupations that have the highest estimated number of employed persons.

Northeast Idaho Table 3: Highest Number of Workers by Occupation	
Occupation	# of workers
Cashiers	3,230
Retail Salespersons	2,250
Office Clerks, General	2,030
Bookkeeping, Accounting & Auditing Clerks	1,430
Janitors & Cleaners, Except Maids & Housekeeping Cleaners	1,340
Secretaries, Except Legal, Medical, & Executive	1,300
Secondary School Teachers, Except Special & Vocational Education	1,280
Graders & Sorters, Agricultural Products	1,250
Elementary School Teachers, Except Special Education	1,210

Northeast Table 4: Wage Survey Results provides a list of the occupational classifications that were used for the survey. *Office & Administrative Occupations* showed the highest number of total employed persons of all occupational classifications at 14,470, almost 16 percent of all employment listed in the survey. The next highest was *Sales & Related Occupations* at almost 10 percent of the total, or 8,930 persons. The smallest occupational category was *Legal Occupations*, at 500, making up .05 percent of the total employed.

Northeast Idaho Table 4: Wage Survey Results			
Occupational Classification	# Employed	% Employed	Avg Hourly Wage
Management	6,050	6.6	\$ 29.03
Business & Financial Operations	2,420	2.7	\$ 22.26
Computer & Mathematical	1,350	1.5	\$ 26.38
Architecture & Engineering	1,660	1.8	\$ 25.35
Life, Physical, & Social Science	2,200	2.4	\$ 24.97
Community & Social Service	1,150	1.3	\$ 16.74
Legal Occupations	500	0.5	\$ 22.49
Education, Training, & Library	4,580	5.0	\$ 16.79
Arts, Design, Entertainment, Sports & Media	1,050	1.2	\$ 14.49
Healthcare Practitioners & Technical	3,570	3.9	\$ 23.42
Healthcare Support	2,330	2.6	\$ 8.89
Protective Service	2,150	2.4	\$ 14.81
Food Preparation & Serving-Related	5,730	6.3	\$ 7.39
Building & Grounds Cleaning & Maintenance	2,790	3.1	\$ 9.44
Personal Care & Service	930	1.0	\$ 9.30
Sales & Related	8,930	9.8	\$ 11.33
Office & Administrative	14,470	15.9	\$ 11.49
Farming, Fishing & Forestry	1,900	2.1	\$ 8.44
Construction & Extraction	5,740	6.3	\$ 16.51
Installation, Maintenance, & Repair	4,300	4.7	\$ 17.22
Production	7,050	7.7	\$ 13.26
Transportation & Material Moving	8,390	9.2	\$ 11.76
Total, All Occupations	91,030		\$ 29.03

AREA DEVELOPMENTS

Bonneville County

- The Wal-Mart Superstore on Hitt Road in Ammon plans its grand opening on March 19. The store is more than 205,000-square feet and will employ close to 500 people. Daylight Donuts plans to open at Taylor Crossing on the River in Idaho Falls this March; it will be in the same building as L.W.'s Chevron Convenience Store and Iceburg Inn. Morris Murdock Travel of Idaho Falls joined the Carlson Wagonlit Travel Associate program, which will allow the business to increase its exposure, assist with commercial business development, and participate in other association programs. Prescription Center Home Care plans a March opening for a larger, state-of-the-art facility at 2250 Coronado in Idaho Falls, located between the new Mountain View Hospital and Eastern Idaho Regional Medical Center. It will house an ambulatory infusion center where patients can receive doctor-ordered care in a clinical setting as an alternative to receiving care at home. It will also have a "Class 1,000" Clean Room for preparation of pharmaceutical IVs. It will employ 20 to 35 people. Its Prescription Center Pharmacy at 245 North Placer will remain in operation at its current location.

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CENSUS 2000 — WHERE ARE IDAHOANS FROM?

Every ten years the U.S. Census Bureau takes snapshots of the American population by asking a series of questions about our lives that provides the most detailed picture of who Americans are. The Census Bureau recently released new statistics from the 2000 Census of Population, providing interesting facts about the U.S. and Idaho. This FYI article uses 2000 Census data to look at where Idaho residents were born, whether they moved between 1995 and 2000, who makes up Idaho's foreign-born population, and what languages Idahoans speak at home.

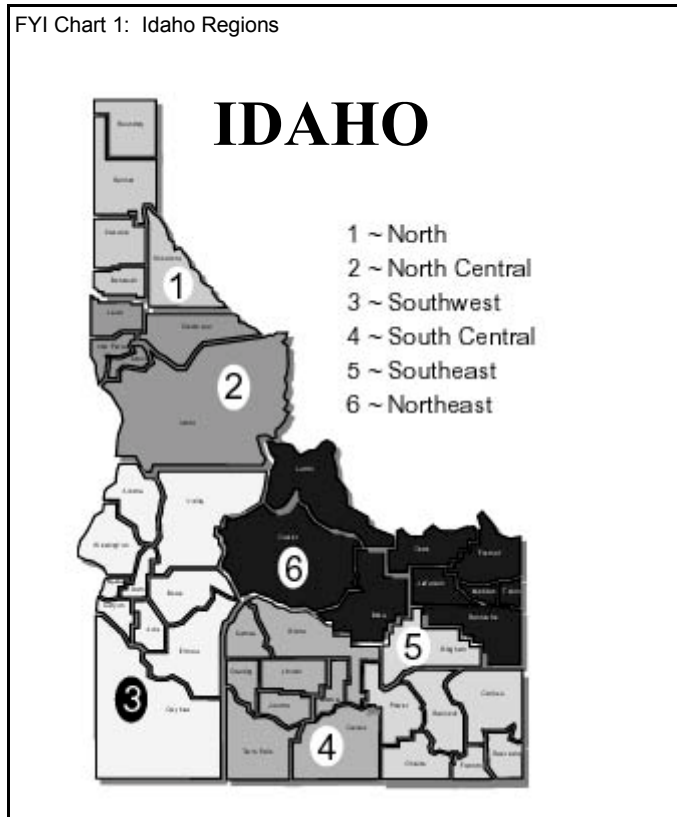
Region 1 designates the Idaho Panhandle whose largest city is Coeur d'Alene, and includes Benewah, Bonner, Boundary, Kootenai, and Shoshone Counties. Region 2 designates North Central Idaho whose largest city is Lewiston, and includes Clearwater, Idaho, Latah, Lewis, and Nez Perce Counties. Region 3—Southwest Idaho—is the state's most populous region with the state's largest city, Boise. It includes Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley, and Washington Counties. Region 4—South Central Idaho, including Twin Falls—encompasses Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka, and Twin Falls Counties. Region 5—Southeast Idaho—is dominated by Pocatello and includes Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida, and Power Counties. Region 6—sometimes called Northeast Idaho and whose largest city is Idaho Falls—includes Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison, and Teton Counties. FYI Chart 1 shows the location of each region.

WHERE IDAHOANS WERE BORN

Of the 1,293,953 people living in Idaho during the 2000 Census, fewer than half—610,929, or 47.2 percent—were born in Idaho. For the entire U.S. in 2000, 60.0 percent of Americans were living in the state where they were born. When the states are ranked by the percentage of the population born in the state of residence, Idaho is listed as forty-first, indicating a high degree of mobility.

The large population influx of the 1990s decreased the percentage of residents born here. The 1990 Census, which occurred after ten years of slow population growth, found 52.1 percent of Idahoans

FYI Chart 1: Idaho Regions



were born in Idaho. In 1980, following the rapid population growth of the 1970s, 49.1 percent of Idahoans were born in Idaho.

FYI Table 1 (page 22) shows detailed information about place of birth for residents of the United States, Idaho, its regions, and its counties.

Of the 608,189 Idahoans born in other states, 63.4 percent were born in the West; 19.7 percent in the Midwest; 11.2 percent in the South; and 5.7 percent in the Northeast.

Another 10,755 people, or 0.8 percent, were born in Puerto Rico or other U.S. islands, or were born abroad to American parents.

In addition, 64,080 people—5.0 percent of Idaho residents—were “foreign-born” (born as citizens of other countries). A later segment in this FYI article provides information about foreign-born Idahoans (see page 23).

Article continued on page 23

FYI Table 1: Nativity & Place of Birth

	Total Population	Percent of Population Born in State of Residence	# Born in Another State	Percent of Population Born in Another State	# Foreign-Born	Percent of Foreign-Born Population
United States	281,421,906	60.0%	78,057,078	27.7%	31,107,889	11.1%
State of Idaho	1,293,953	47.2%	608,189	47.0%	64,080	5.0%
Region 1	178,333	32.3%	115,433	64.7%	3,964	2.2%
Region 2	100,533	47.5%	49,524	49.3%	2,522	2.5%
Region 3	535,652	43.5%	266,286	49.7%	30,656	5.7%
Region 4	162,397	52.2%	62,799	38.7%	13,899	8.6%
Region 5	154,007	61.2%	53,328	34.6%	5,645	3.7%
Region 6	163,031	57.6%	60,819	37.3%	7,394	4.5%
COUNTIES						
Ada	300,904	44.1%	152,185	50.6%	12,864	4.3%
Adams	3,476	45.1%	1,830	52.6%	59	1.7%
Bannock	75,565	60.7%	27,575	36.5%	1,641	2.2%
Bear Lake	6,411	59.4%	2,504	39.1%	72	1.1%
Benewah	9,171	40.3%	5,373	58.6%	59	0.6%
Bingham	41,735	69.2%	10,111	24.2%	2,534	6.1%
Blaine	18,991	29.5%	11,151	58.7%	2,015	10.6%
Boise	6,670	44.2%	3,499	52.5%	160	2.4%
Bonner	36,835	26.9%	25,846	70.2%	746	2.0%
Bonneville	82,522	57.7%	31,154	37.8%	3,216	3.9%
Boundary	9,871	41.4%	5,389	54.6%	288	2.9%
Butte	2,899	61.1%	999	34.5%	114	3.9%
Camas	991	57.8%	397	40.1%	18	1.8%
Canyon	131,441	47.5%	56,717	43.2%	11,360	8.6%
Caribou	7,304	60.3%	2,756	37.7%	132	1.8%
Cassia	21,416	59.9%	6,933	32.4%	1,567	7.3%
Clark	1,022	45.9%	256	25.0%	288	28.2%
Clearwater	8,930	46.8%	4,605	51.6%	108	1.2%
Custer	4,342	51.7%	1,992	45.9%	99	2.3%
Elmore	29,130	25.0%	18,361	63.0%	2,247	7.7%
Franklin	11,329	43.1%	6,027	53.2%	387	3.4%
Fremont	11,819	66.0%	3,112	26.3%	857	7.3%
Gem	15,181	49.0%	6,917	45.6%	751	4.9%
Gooding	14,155	53.6%	4,840	34.2%	1,649	11.6%
Idaho	15,511	51.8%	7,229	46.6%	181	1.2%
Jefferson	19,155	68.5%	4,816	25.1%	1,131	5.9%
Jerome	18,342	53.4%	6,526	35.6%	1,935	10.5%
Kootenai	108,685	31.0%	71,530	65.8%	2,598	2.4%
Latah	34,935	40.5%	18,937	54.2%	1,485	4.3%
Lemhi	7,806	44.5%	4,169	53.4%	118	1.5%
Lewis	3,747	55.6%	1,608	42.9%	42	1.1%
Lincoln	4,044	54.7%	1,414	35.0%	407	10.1%
Madison	27,467	53.9%	11,436	41.6%	975	3.5%
Minidoka	20,174	59.0%	5,978	29.6%	2,205	10.9%
Nez Perce	37,410	51.7%	17,145	45.8%	706	1.9%
Oneida	4,125	42.8%	2,247	54.5%	86	2.1%
Owyhee	10,644	49.3%	4,074	38.3%	1,270	11.9%
Payette	20,578	28.5%	13,366	65.0%	1,132	5.5%
Power	7,538	61.3%	2,108	28.0%	793	10.5%
Shoshone	13,771	44.4%	7,295	53.0%	273	2.0%
Teton	5,999	41.7%	2,885	48.1%	596	9.9%
Twin Falls	64,284	53.2%	25,560	39.8%	4,103	6.4%
Valley	7,651	44.7%	4,088	53.4%	104	1.4%
Washington	9,977	40.0%	5,249	52.6%	709	7.1%

The percentages do not add to 100 percent because of native-born Americans who were born overseas.

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

WHERE IDAHOANS LIVED IN 1995

With the large number of people moving into Idaho during the 1990s, it's not surprising to see that 15.3 percent of the people living in Idaho in 2000 had lived in another state in 1995, while only 8.4 percent of Americans had lived in a different state in 1995.

Idaho ranked sixth among the 50 states for the percentage of its 2000 population that lived in another state in 1995. The top five states were Nevada (25.1 percent), Arizona (16.8 percent), Alaska (16.5 percent), Colorado (16.1 percent), and Wyoming (15.7 percent).

FYI Table 2 (pages 24-25) shows detailed information about the mobility of Idaho's population between 1995 and 2000. It shows the percent of people who lived in the same county, in a different county in the same state, in a different state, and elsewhere in 1995. People who lived "elsewhere" include U.S. citizens who lived in Puerto Rico, U.S. islands, or outside the United States, as well as immigrants who entered the U.S. after 1995.

It would be interesting to know how many of the people who recently moved to Idaho were born here or grew up here and are returning, however, the Census does not record such information. The state's economic growth in the 1990s allowed many people who grew up in Idaho, but went elsewhere for schooling, military service, and employment, to return to the state. In addition, many people who moved out of the state as youth or after the recession of the 1980s are moving "home" when they retire.

ORIGINS OF FOREIGN-BORN IDAHOANS

While 5.0 percent of Idaho's population is foreign-born, 11.1 percent of the U.S. population is foreign-born.

The Idaho county with the highest percentage of foreign-born residents is Clark County in Eastern Idaho, where 28.2 percent of the population is foreign-born. Owyhee County has the next highest percentage with 11.9 percent, Gooding with 11.7 percent, Minidoka with 10.9 percent, Blaine with 10.7 percent, and Power with 10.5 percent.

More than half—59.8 percent—of Idaho's foreign-born population were born in Latin America, 18.8 percent were born in Europe, and 12.6 were born in Asia.

Of foreign-born individuals, roughly one-third—21,203—are naturalized citizens. FYI Table 3 (page 26) provides some detailed information about Idaho's foreign-born population.

Some foreign-born Idaho residents are temporarily working in the state on farms or in food-processing

plants. In addition, Idaho's colleges and universities host many foreign-born individuals. Migrant workers and college students typically do not have deep ties to Idaho and often do not plan on becoming U.S. citizens. But many foreign-born residents are settled in Idaho communities. One-third of them already are U.S. citizens.

One reason why some foreign-born Idahoans may not be naturalized citizens is time. Becoming a naturalized citizen takes at least five years for immigrants not married to U.S. citizens. About 47.7 percent of Idaho's foreign-born population entered the United States between the censuses conducted on April 1 in 1990 and 2000, 23.7 percent came to the state between 1980 and 1990, and 12.5 percent came to Idaho between 1970 and 1980.

The large number of people who recently entered the U.S. is one reason why the percent of the Idaho population that is foreign-born increased from 2.9 percent in 1990 to 5.0 percent in 2000.

While some people equate "Hispanics" with immigrants from Central and South America, most of the 101,594 Hispanic residents in Idaho are native-born Americans. More than one-third (34.1 percent) of Hispanics were born in Idaho, while another 28.6 percent were born in other states or U.S. territories. Approximately 37.3 percent of Idaho Hispanics were foreign-born.

LANGUAGES IDAHOANS SPEAK AT HOME

The 2000 Census found 111,879 people—9.3 percent of Idahoans five years of age and older—speak a language other than English at home. That was a significant increase from 1990, when 58,995 people—5.8 percent of Idahoans five years of age and older—spoke a language other than English at home.

When the Census asked people about languages spoken at home, they found most of the individuals who spoke other languages at home also spoke English. The Census Bureau did not try to determine whether English or the other language was the primary language of the individual. Therefore, many of the individuals may speak English more than they speak another language.

FYI Table 4 (pages 27-28) shows detailed information about languages spoken at home in the U.S. and Idaho.

Although Idaho's population who speak languages other than English at home has grown rapidly, Idaho still has a much lower percentage than the overall United States; 17.9 percent of American

Article continued on page 26

FYI Table 2: Mobility of Population, 5 Years of Age and Over (part one)

	Total Population 5 Years & Over	Population Who Lived in Same County in 1995	Percent Who Lived in Same County in 1995	Population Who Lived in Different County in Same State in 1995	Percent Who Lived in Different County in Same State in 1995
United States	262,375,152	207,462,491	79.1	25,327,355	9.7
State of Idaho	1,196,793	880,291	73.6	112,607	9.4
Region 1	166,729	122,909	73.7	9,679	5.8
Region 2	94,973	67,731	71.3	11,284	11.9
Region 3	493,338	352,752	71.5	46,540	9.4
Region 4	150,227	114,204	76.0	16,712	11.1
Region 5	141,226	111,868	79.2	12,979	9.2
Region 6	150,300	110,827	73.7	15,413	10.3
COUNTIES					
Ada	277,902	203,895	73.4	20,952	7.5
Adams	3,331	2,468	74.1	433	13.0
Bannock	69,452	53,006	76.3	7,244	10.4
Bear Lake	5,985	4,889	81.7	251	4.2
Benewah	8,572	6,775	79.0	535	6.2
Bingham	38,065	31,656	83.2	3,614	9.5
Blaine	17,837	12,466	69.9	1,230	6.9
Boise	6,236	3,840	61.6	1,375	22.0
Bonner	34,741	25,580	73.6	1,818	5.2
Bonneville	75,742	59,619	78.7	5,913	7.8
Boundary	9,160	7,070	77.2	523	5.7
Butte	2,709	2,181	80.5	292	10.8
Camas	946	631	66.7	237	25.1
Canyon	119,519	86,000	72.0	14,542	12.2
Caribou	6,756	5,641	83.5	441	6.5
Cassia	19,663	15,297	77.8	2,384	12.1
Clark	937	631	67.3	122	13.0
Clearwater	8,498	6,573	77.3	904	10.6
Custer	4,111	3,139	76.4	455	11.1
Elmore	26,736	13,578	50.8	2,017	7.5
Franklin	10,227	8,046	78.7	396	3.9
Fremont	10,922	8,604	78.8	1,383	12.7
Gem	14,112	10,590	75.0	1,795	12.7
Gooding	13,084	9,704	74.2	2,004	15.3
Idaho	14,700	11,140	75.8	1,503	10.2
Jefferson	17,487	13,420	76.7	2,199	12.6
Jerome	16,863	12,360	73.3	2,394	14.2
Kootenai	101,260	73,357	72.4	5,829	5.8
Latah	33,038	19,949	60.4	5,545	16.8
Lemhi	7,407	5,825	78.6	476	6.4
Lewis	3,564	2,736	76.8	494	13.9
Lincoln	3,737	2,643	70.7	622	16.6
Madison	25,504	13,507	53.0	4,256	16.7
Minidoka	18,569	15,101	81.3	1,874	10.1
Nez Perce	35,173	27,333	77.7	2,838	8.1
Oneida	3,821	3,157	82.6	176	4.6
Owyhee	9,828	6,487	66.0	1,805	18.4
Payette	19,047	3,754	72.2	1,559	8.2
Power	6,920	5,473	79.1	857	12.4
Shoshone	12,996	0,127	77.9	974	7.5
Teton	5,481	3,901	71.2	317	5.8
Twin Falls	59,528	46,002	77.3	5,967	10.0
Valley	7,334	5,251	71.6	1,075	14.7
Washington	9,293	6,889	74.1	987	10.6

People living elsewhere in 1995 include U.S. citizens living in Puerto Rico, U.S. islands, or outside the United States and immigrants who entered the U.S. after 1995.

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

FYI Table 2: Mobility of Population, 5 Years of Age and Over (cont. from pg. 25)

	Population Who Lived in Different State in 1995	Percent Who Lived in Different State in 1995	Population Who Lived Elsewhere in 1995	Percent Who Lived Elsewhere in 1995
United States	22,089,460	8.4	7,495,846	2.9
State of Idaho	182,929	15.3	20,966	1.8
Region 1	32,958	19.8	1,183	0.7
Region 2	14,641	15.4	1,317	1.4
Region 3	82,459	16.7	11,587	2.3
Region 4	15,946	10.6	3,365	2.2
Region 5	14,785	10.5	1,594	1.1
Region 6	22,140	14.7	1,920	1.3
COUNTIES				
Ada	47,400	17.1	5,655	2.0
Adams	407	12.2	23	0.7
Bannock	8,441	12.2	761	1.1
Bear Lake	837	14.0	8	0.1
Benewah	1,169	13.6	93	1.1
Bingham	2,309	6.1	486	1.3
Blaine	3,440	19.3	701	3.9
Boise	929	14.9	92	1.5
Bonner	7,120	20.5	223	0.6
Bonneville	9,573	12.6	637	0.8
Boundary	1,483	16.2	84	0.9
Butte	232	8.6	4	0.1
Camas	71	7.5	7	0.7
Canyon	16,587	13.9	2,390	2.0
Caribou	637	9.4	37	0.5
Cassia	1,719	8.7	263	1.3
Clark	105	11.2	79	8.4
Clearwater	962	11.3	59	0.7
Custer	511	12.4	6	0.1
Elmore	8,628	32.3	2,513	9.4
Franklin	1,630	15.9	155	1.5
Fremont	766	7.0	169	1.5
Gem	1,564	11.1	163	1.2
Gooding	1,019	7.8	357	2.7
Idaho	2,015	13.7	42	0.3
Jefferson	1,604	9.2	264	1.5
Jerome	1,847	11.0	262	1.6
Kootenai	21,378	21.1	696	0.7
Latah	6,570	19.9	974	2.9
Lemhi	1,011	13.6	95	1.3
Lewis	324	9.1	10	0.3
Lincoln	406	10.9	66	1.8
Madison	7,263	28.5	478	1.9
Minidoka	1,158	6.2	436	2.3
Nez Perce	4,770	13.6	232	0.7
Oneida	458	12.0	30	0.8
Owyhee	1,204	12.3	332	3.4
Payette	3,513	18.4	221	1.2
Power	473	6.8	117	1.7
Shoshone	1,808	13.9	87	0.7
Teton	1,075	19.6	188	3.4
Twin Falls	6,286	10.6	1,273	2.1
Valley	982	13.4	26	0.4
Washington	1,245	13.4	172	1.9

People living elsewhere in 1995 include U.S. citizens living in Puerto Rico, U.S. islands, or outside the United States and immigrants who entered the U.S. after 1995.

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

FYI Table 3: Foreign-Born Population

	Total Foreign-Born Population	Naturalized Citizens	Not Citizens	Entered 1990 to March 2000	Region of Birth of Foreign Born						
					Total (excluding born at sea)	Europe	Asia	Africa	Oceania	Latin America	Northern America
United States	31,107,889	12,542,626	18,565,263	13,178,276	31,107,573	4,915,557	8,226,254	881,300	168,046	16,086,974	829,442
State of Idaho	64,080	21,203	42,877	30,570	64,080	12,064	8,073	545	512	38,344	4,542
Region 1	3,964	2,209	1,755	899	3,964	1,569	585	44	98	467	1,201
Region 2	2,522	937	1,585	1,224	2,522	641	964	37	59	365	456
Region 3	30,656	10,426	20,230	14,955	30,656	6,441	4,715	326	191	17,394	1,589
Region 4	13,899	3,729	10,170	7,059	13,899	2,162	644	57	76	10,594	366
Region 5	5,645	1,747	3,898	2,673	5,645	566	703	50	19	4,006	301
Region 6	7,394	2,155	5,239	3,760	7,394	685	462	31	69	5,518	629

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

residents speak a language other than English at home. When the 50 states are ranked from highest to lowest for percentage of population that speaks languages other than English at home, Idaho ranks twenty-third.

Of the Idaho residents who speak a language other than English at home, 80,241—71.7 percent—speak Spanish, while 19,460—17.4 percent—speak another Indo-European language. They include 4,883 German speakers, 2,765 French speakers, 1,211 Serbo-Croatian speakers, 1,192 Portuguese speakers, and 925 Italian speakers.

Of the Idaho residents who speak a language other than English at home, 8,105—7.2 percent—speak an Asian or Pacific Islander language. They include 1,410 residents who speak Japanese, 1,194 who speak Chinese, 1,054 who speak Tagalog (a language of the Philippines), 994 who speak Vietnamese, and 766 who speak Korean.

Of the Idaho residents who speak a language other than English at home, 2,286 people—4.9 percent—speak Native American languages. The majority of these individuals live on the Fort Hall (Shoshone-Bannock) Reservation, Nez Perce, and Coeur d'Alene Reservations. Some immigrants and their families speak the Native American languages of Central America.

The remaining 1,787—2.1 percent of the Idaho residents who speak a language other than English at home—speak African, Arabic, Hebrew, or other languages. Most of these individuals live in counties with colleges (Bannock County's Idaho State University, Latah County's University of Idaho, Nez Perce County's Lewis-Clark State College, Ada County's Boise State University) or in Elmore County where Mountain Home Air Force base is located.

The Census asked respondents to identify how well each member of their household spoke English. In Idaho more than half of the residents who speak a language other than English at home—58.4 percent—were identified as speaking English "very well," while

18.7 percent as speak English "well," 15.9 percent speak English "not well," and 7.1 percent speak English "not at all." Approximately 45.4 percent of Spanish speakers were identified as speaking English less than "very well;" 28.1 percent of other Indo-European speakers were identified as speaking English less than "very well;" 43.8 percent of Asian-Pacific Islander speakers were identified as speaking English less than "very well;" and 26.2 percent of people speaking other languages were identified as speaking English less than "very well."

Of the 26,582 Idaho children five to 17 years of age who speak languages other than English at home, 2.3 percent do not speak English at all, 11.3 percent speak English "not well," 19.5 percent speak English "well," and 66.8 percent speak English "very well." Of the 78,332 Idaho adults 18 to 64 years of age who speak languages other than English at home, 8.7 percent do not speak English at all, 17.8 percent speak English "not well," 18.2 percent speak English "well," and 55.3 percent speak English "very well." Of the 6,965 Idahoans 65 years and over who speak languages other than English at home, 7.2 percent do not speak English at all, 11.5 percent speak English "not well," 20.4 percent speak English "well," and 61.0 percent speak English "very well."

Of the Idahoans who speak languages other than English at home, 61,684—55.1 percent—are native-born (born as U.S. citizens). Of the native-born Idahoans who speak languages other than English at home, 77.9 percent speak English "very well."

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FYI Table 4: Languages Spoken at Home by Population 5 Years of Age and Over (part one)

	Total Population 5 Years of Age and Over	Speaking English at Home	Speaking Spanish at Home	Speaking Other Indo-European Languages at Home	Speaking Asian & Pacific Islander Languages at Home	Speaking Other Languages at Home
United States	262,375,152	215,423,557	28,101,052	10,017,989	6,960,065	1,872,489
State of Idaho	1,196,793	1,084,914	80,241	19,460	8,105	4,073
Region 1	166,729	160,484	2,877	2,417	541	410
Region 2	94,973	90,396	1,937	1,234	906	500
Region 3	493,338	441,378	37,760	9,396	4,804	1,554
Region 4	150,227	127,977	18,657	2,824	517	252
Region 5	141,226	128,743	9,051	1,501	712	1,219
Region 6	150,300	137,490	9,959	2,088	625	138
COUNTIES						
Ada	277,902	256,116	10,291	6,962	3,437	1,096
Adams	3,331	3,204	64	44	15	4
Bannock	69,452	65,058	2,360	926	560	548
Bear Lake	5,985	5,763	172	41	4	5
Benewah	8,572	8,284	147	60	13	68
Bingham	38,065	32,870	4,232	313	119	531
Blaine	17,837	15,604	1,663	471	78	21
Boise	6,236	5,923	189	94	18	12
Bonner	34,741	33,549	457	529	110	96
Bonneville	75,742	69,784	4,448	1,133	333	44
Boundary	9,160	8,609	292	178	20	61
Butte	2,709	2,539	141	14	5	10
Camas	946	919	17	10	0	0
Canyon	119,519	98,451	18,643	1,395	834	196
Caribou	6,756	6,417	230	102	3	4
Cassia	19,663	16,349	3,043	175	47	49
Clark	937	587	338	9	3	0
Clearwater	8,498	8,157	185	103	22	31
Custer	4,111	3,933	129	44	5	0
Elmore	26,736	23,201	2,696	413	330	96
Franklin	10,227	9,504	649	54	15	5
Fremont	10,922	9,756	1,037	92	20	17
Gem	14,112	13,098	803	108	77	26
Gooding	13,084	10,727	2,189	97	20	51
Idaho	14,700	14,196	316	98	24	66
Jefferson	17,487	15,605	1,629	131	87	35
Jerome	16,863	14,012	2,592	244	3	12
Kootenai	101,260	97,526	1,726	1,482	359	167
Latah	33,038	30,801	884	697	537	119
Lemhi	7,407	7,157	159	72	19	0
Lewis	3,564	3,454	57	24	7	22
Lincoln	3,737	3,180	516	22	5	14
Madison	25,504	23,338	1,450	548	136	32
Minidoka	18,569	14,530	3,782	181	51	25
Nez Perce	35,173	33,788	495	312	316	262
Oneida	3,821	3,673	116	22	7	3
Owyhee	9,828	7,563	2,109	51	17	88
Payette	19,047	17,105	1,704	189	37	12
Power	6,920	5,458	1,292	43	4	123
Shoshone	12,996	12,516	255	168	39	18
Teton	5,481	4,791	628	45	17	0
Twin Falls	59,528	52,656	4,855	1,624	313	80
Valley	7,334	7,089	154	59	14	18
Washington	9,293	8,074	1,107	81	25	6

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

FYI Table 4: Languages Spoken at Home by Population 5 Years of Age and Over (cont. from pg. 28)

	% of Population 5 Years of Age & Over that Speaks Indicated Languages at Home						Speak English Less than "Very Well"	Percent of Population 5 & Over that Speaks English Less than "Very Well"
	English	Spanish	Other Indo- European Languages	Asian & Pacific Islander Languages	Other Languages			
United States	82.1	10.7	3.8	2.7	0.7	21,320,407		8.1
State of Idaho	90.7	6.7	1.6	0.7	0.3	46,539		3.9
Region 1	96.3	1.7	1.4	0.3	0.2	1,539		0.9
Region 2	95.2	2.0	1.3	1.0	0.5	1,398		1.5
Region 3	89.5	7.7	1.9	1.0	0.3	23,172		4.7
Region 4	85.2	12.4	1.9	0.3	0.2	10,613		7.1
Region 5	91.2	6.4	1.1	0.5	0.9	4,556		3.2
Region 6	91.5	6.6	1.4	0.4	0.1	5,261		3.5
COUNTIES								
Ada	92.2	3.7	2.5	1.2	0.4	8,128		2.9
Adams	96.2	1.9	1.3	0.5	0.1	37		1.1
Bannock	93.7	3.4	1.3	0.8	0.8	1,128		1.6
Bear Lake	96.3	2.9	0.7	0.1	0.1	61		1.0
Benewah	96.6	1.7	0.7	0.2	0.8	67		0.8
Bingham	86.4	11.1	0.8	0.3	1.4	2,214		5.8
Blaine	87.5	9.3	2.6	0.4	0.1	1,091		6.1
Boise	95.0	3.0	1.5	0.3	0.2	125		2.0
Bonner	96.6	1.3	1.5	0.3	0.3	301		0.9
Bonneville	92.1	5.9	1.5	0.4	0.1	2,354		3.1
Boundary	94.0	3.2	1.9	0.2	0.7	140		1.5
Butte	93.7	5.2	0.5	0.2	0.4	84		3.1
Camas	97.1	1.8	1.1	0.0	0.0	12		1.3
Canyon	82.4	15.6	1.2	0.7	0.2	9,956		8.3
Caribou	95.0	3.4	1.5	0.0	0.1	132		2.0
Cassia	83.1	15.5	0.9	0.2	0.2	1,484		7.5
Clark	62.6	36.1	1.0	0.3	0.0	259		27.6
Clearwater	96.0	2.2	1.2	0.0%	0.4	124		1.5
Custer	95.7	3.1	1.1	0.1	0.0	82		2.0
Elmore	86.8	10.1	1.5	1.2	0.4	1,609		6.0
Franklin	92.9	6.3	0.5	0.1	0.0	329		3.2
Fremont	89.3	9.5	0.8	0.2	0.2	544		5.0
Gem	92.8	5.7	0.8	0.5	0.2	523		3.7
Gooding	82.0	16.7	0.7	0.2	0.4	1,433		11.0
Idaho	96.6	2.1	0.7	0.2	0.4	125		0.9
Jefferson	89.2	9.3	0.7	0.5	0.2	957		5.5
Jerome	83.1	15.4	1.4	0.0	0.1	1,581		9.4
Kootenai	96.3	1.7	1.5	0.4	0.2	868		0.9
Latah	93.2	2.7	2.1	1.6	0.4	686		2.1
Lemhi	96.6	2.1	1.0	0.3	0.0	46		0.6
Lewis	96.9	1.6	0.7	0.2	0.6	58		1.6
Lincoln	85.1	13.8	0.6	0.1	0.4	299		8.0
Madison	91.5	5.7	2.1	0.5	0.1	541		2.1
Minidoka	78.2	20.4	1.0	0.3	0.1	1,933		10.4
Nez Perce	96.1	1.4	0.9	0.9	0.7	405		1.2
Oneida	96.1	3.0	0.6	0.2	0.1	57		1.5
Owyhee	77.0	21.5	0.5	0.2	0.9	1,186		12.1
Payette	89.8	8.9	1.0	0.2	0.1	1,008		5.3
Power	78.9	18.7	0.6	0.1	1.8	635		9.2
Shoshone	96.3	2.0	1.3	0.3	0.1	163		1.3
Teton	87.4	11.5	0.8	0.3	0.0	394		7.2
Twin Falls	88.5	8.2	2.7	0.5	0.1	2,780		4.7
Valley	96.7	2.1	0.8	0.2	0.2	74		1.0
Washington	86.9	11.9	0.9	0.3	0.1	526		5.7

Source: U.S. Census of Population, Census Bureau, U.S. Department of Commerce, April 2000

The number of jobs (not counting farms and the self-employed) is expected to increase by 20,000 during this period. Adding the self-employed increases that total to 25,000. Agriculture employment is expected to be flat.

Only a few industries are expected to lose jobs.

- *Finance, Insurance, and Real Estate* is population and business-outlook sensitive. The slower population growth and the trend to substitute electronic services for individual bank staff are the two main reasons for the expected job decline.
- *All Other Manufacturing* is a catchall for the manufacturing industries not listed separately. Notable among the *All Other Manufacturing* industries are trailer, paper, and chemical manufacturers. Closing of a chemical plant near Pocatello and weak sales and prices in trailers and paper have caused employment declines. The fairly small future job losses probably will come through attrition. On the other hand more economic development successes, such as Buck Knives' relocation to Post Falls, might belie our expectations.
- *Food Processing* is expected to continue its employment decline through the forecast period. Reasons for the decline have been plant closings and shift reductions, increased automation, changing product preferences, export market conditions, and product transportation costs. Cheese manufacturing employment has increased, but substantial further increases in this industry are not anticipated.
- *Lumber and Wood Products* will continue to lose a substantial number of jobs. Additional mill closures and layoffs would not be surprising. The same conditions that have caused recent decreases will persist during the next 18 months. There is hope Canadian lumber imports will decrease and markets in Japan will improve, but any improvements in these conditions will not lead to an immediate employment increase because of existing mill unused capacity, low prices in domestic markets, and competition from producers in southern states.
- *Computers and Electrical Components* will continue to be considered the bellwether for Idaho's economy. These industries are relatively new, have lead to economic diversification, are concentrated in the urban areas, thereby affecting business conditions for a wide range of businesses and large citizenry, and are considered good jobs. We think there will be a turnaround in these industries and employment levels will increase, but this is dependent upon the nation's economic recovery and business investment decisions. We think there might be some fur-

ther job losses in the next six months but job gains during the next 12 months. It is predicted these industries will employ 22,400 people by 2004. However, this is still below the 25,400 jobs level experienced in 2000-2001.

- *State and Local Government* will lose jobs. How many depends upon state and local budget setting and taxing policies. *State Government* is the largest single employer in Idaho. Local governments, including school districts and tribal employment, collectively employ nearly two-and-a-half times more people than the state. Both levels of government are extremely sensitive to population growth and demographics because these elements determine the level and kind of services people want and how much they are willing to pay for them. Currently the revenue stream is bleak in comparison to budget requests. Employment predictions cannot be made with any certainty, although we project job losses at the state level and job gains at the local level.
- Job gains are predicted for all major industry groups that employ more than 25,000 people. *Health Services* will lead all industries in rate of growth, but a growing labor shortage in some of occupations within this industry might temper the growth pace. Further, health care costs are a major concern to almost everyone, and drastic cost containment measures might lead to slower employment growth.

In summary, Idaho's economy and employment picture will improve for all but a few industries. Wages are not expected to increase substantially except for the highly skilled or those in shortage occupations. As the urban economies improve and unemployment rates come down in them, more pressure for increased wages likely will result.

Idaho survived the recession in moderately good shape, in terms of overall employment, and can return to its growth status fairly easily.

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Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are two MSAs in Idaho—Boise City (including Ada and Canyon counties) and Pocatello City (including Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.